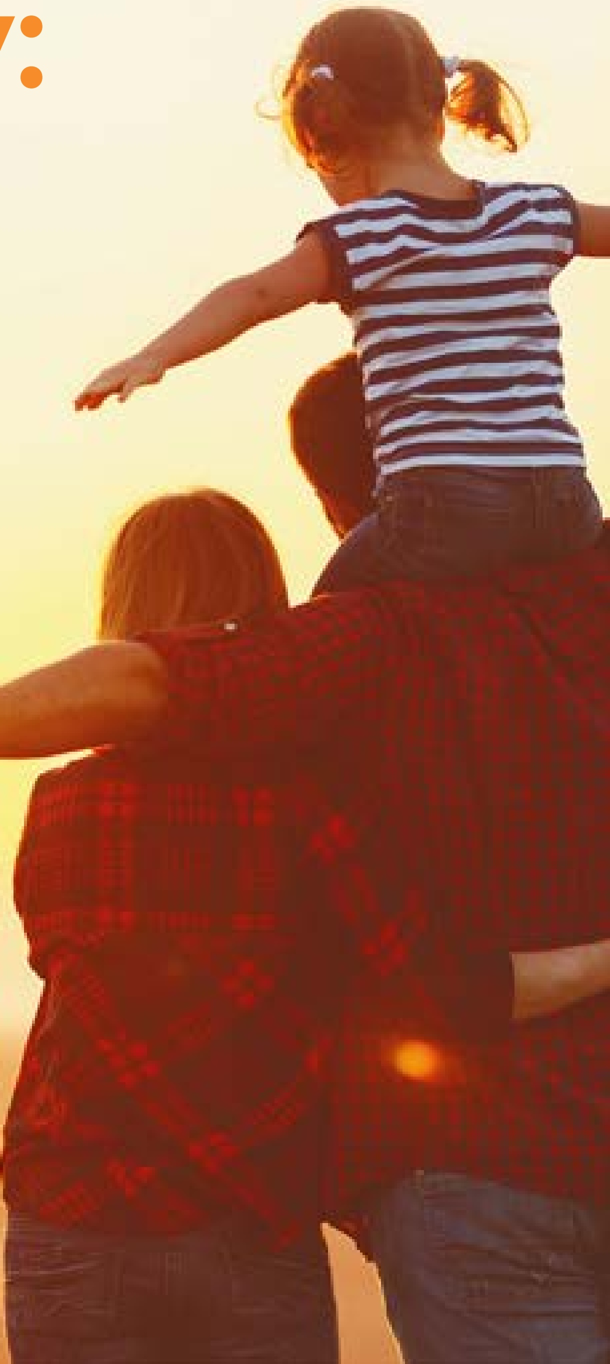
NATIONAL CENTER FOR FAMILY PHILANTHROPY

FIDELITY Charitable®

Legacy in Family Philanthropy:

A Modern Framework

Family Workbook



Discussion Starters

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Introduction

Through interviews with dozens of donors, *Legacy in Family Philanthropy: A Modern Framework*, explores big concepts, such as how the ever-evolving idea of legacy relates to values-driven giving and a commitment to impact.

It also explores practical matters, such as how multigenerational families can—and do—navigate conversations about legacy, whether you use that particular word or not.

While *Legacy in Family Philanthropy* offers an overarching framework and legal considerations, this companion workbook provides stories, practical tips, and discussion starters for families and donors.

We hope this will give you useful concepts to reflect upon, and accessible tools to use in your own family's giving journey.

Dive into whichever piece speaks to you, and be sure to spend some time reflecting on—or better yet, talking with loved ones about—the discussion prompts that follow.

Many thanks to the generous and thoughtful donors who shared their candid stories, reflections, and guidance with us; we hope that you find stories that ring true in these pages and that you, too, learn something new. You give us faith in philanthropy's true ability for change-making, and for cultivating family beauty and connectedness through the complex, challenging, privilege of giving.

Janice Simsohn Shaw
Researcher & Writer

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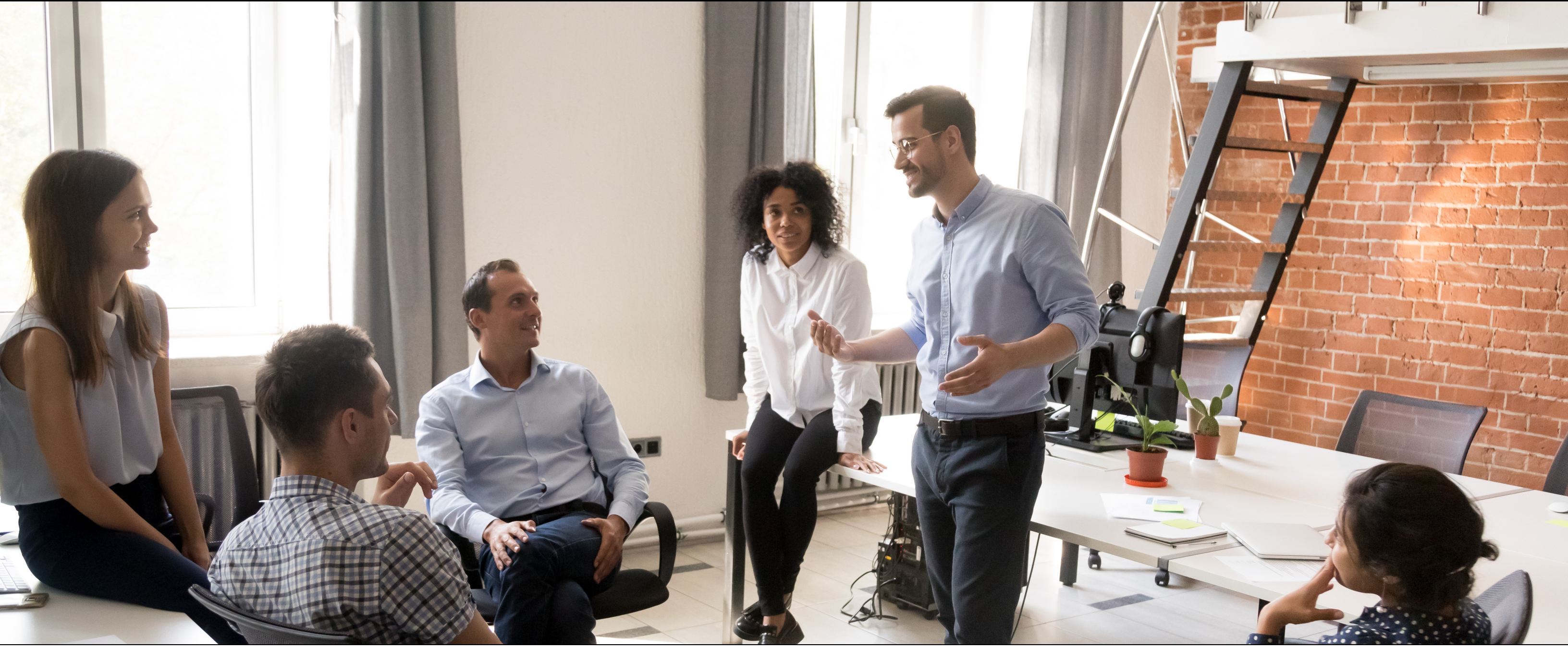


Discussion Starters

Questions for Reflection & Discussion

Articulating and refining your philanthropic legacy is an iterative process, with many points of reflection, inflection, and conversation. Here are some questions to help you review and understand each lever and discuss with others as you dive in.

A Modern Framework: Legacy Levers

LEVER 1: VALUES

- What are the three core values that drive your giving and why?
- How do these values align with—or differ from—the values of others involved in your giving, including past, present, and even future family members? Where is there the most powerful alignment in values?
- What is one philanthropic gift you've made, small or large, that most embodies this lever for you, and why?

LEVER 2: INTENT

- What motivates you and your family to give?
- How does your founding donor's intent currently impact your work, whether that founding donor is you or a relative who is no longer alive?
- What core tenet, family story, or kernel of donor intent would you like to see carried through into the future of your family's philanthropy?
- What is one philanthropic gift you've made, small or large, that most embodies the concept of donor intent for you, and why?

LEVER 3: PLACE

- What place or places do you feel most connected to in your giving, and why?
- Has this changed over the years, or do you imagine it changing in the future; is there agreement among members of your family on this question?
- What is one philanthropic gift you've made, small or large, that most embodies your pride of place, and why?

LEVER 4: FAMILY

- What does the "family" in family philanthropy mean to you at this time?
- How does giving together impact your family, and how does giving as a family impact your giving?
- What is one philanthropic gift you've made, small or large, that most embodies family for you, and why?

LEVER 5: ACTION

- How would you describe your family's current legacy in action—that is, what piece of how you do your giving feels most meaningful as a legacy lever?
- Which of the trends in action resonate most for you, and why?
  - ◊ Long-term, flexible support
  - ◊ Using privilege to share power and decision-making authority
  - ◊ Spending big, spending now
  - ◊ Building authentic relationships and trust
- What is one philanthropic gift you've made, small or large, that most embodies this lever for you, and why?

LEGACY LEVERS: BIG PICTURE QUESTIONS

- Which levers feel instinctually most resonant and important to you right now?
    - ◊ Which levers challenge, confuse, or do not resonate with you?
    - ◊ What about for other members of your family?
    - ◊ Which levers can you imagine becoming increasingly important in the future?
- *Why* do you give? How does this align with the legacy you wish to create?
- *How* do you give? How does this align with the legacy you wish to create?

UNDERSTANDING LEGACY: STORIES FROM FAMILIES IN CHANGING TIMES

- What speaks to you in the donor stories, and why?
- What story of your own would you like to share with others in your family?

PRACTICAL MATTERS: STRATEGIES, TIPS, & TOOLS FOR FAMILY ENGAGEMENT IN LEGACY

- What ideas in this section do you want to take note of that might be helpful to you in your journey?

NEXT STEPS

- Who in your family—or beyond—might you like to discuss your giving legacy with?
- What are one or two next steps you might take in refining your unique family giving legacy? Examples might include:
    - ◊ Engaging younger generations to interview older generations to learn about their life journeys, lessons learned, and hopes for your family's giving. And/or vice-versa—invite older family members to interview the youth—sure to be a powerful experience for all!
    - ◊ Gathering for a family retreat—even virtually—to explore shared values
    - ◊ Committing to spending a small but set amount of family meeting time each time you gather in the coming year around your philanthropy to explore one of the questions.
- Which of the above levers resonate most strongly for you and feel most important to your family's giving right now?
- If you could sum up your intended legacy today in three to five words, what would you say?

Understanding Legacy: Stories From Families in Changing Times

The following collection of first-person case studies illuminate the diverse and changing concept of legacy across a far-ranging group of giving families. These stories demonstrate how the legacy levers highlighted earlier in this workbook may play out in practice in thoughtful and committed philanthropic families.

It's important to note that the characteristics of giving families are changing. Donors are an increasingly diverse group, generating wealth in different ways. Leadership is increasingly diverse, from generation to gender to race. And new family relationship models add to the richness and complexity of family giving. Each of these shifts—as well as other shifts in the field and society at large—informs this new framework.

This research focused on families who give together primarily through foundations and donor-advised funds (DAFs); however, we would be remiss not to note the tremendous growth of giving circles which are increasingly prevalent in black and brown communities, and among younger donors. This collective approach to giving is changing thinking and approaches to questions of legacy.

A Generosity of Spirit: The Legacy of Black Philanthropy

Excerpt from NCFP blog by Maya Diggs.

"African American giving is grounded in a collective sense of responsibility and obligation towards the community and the continuing larger struggle for liberation. It is based on a generosity of spirit as an expression of dignity, humanity and identity. So, anyone can give. One does not have to be rich or be limited to monetary gifts to express this generosity. Whatever one has that may be helpful to others can and should be shared for collective benefit and communal uplift."

–***Tyrone Freeman***, Author of Madam C. J. Walker's Gospel of Giving: Black Women's Philanthropy During Jim Crow and director of undergraduate programs at IU Lilly Family School of Philanthropy

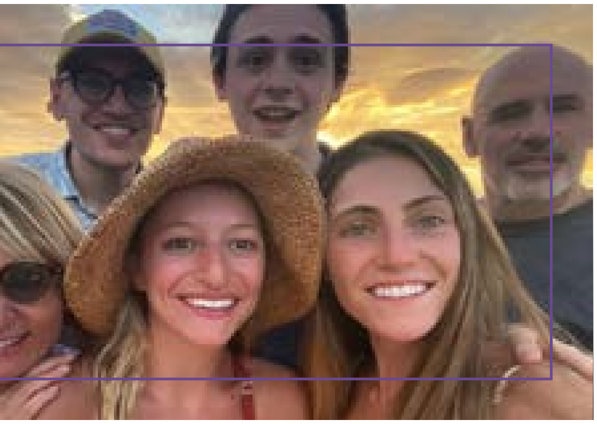
Philanthropy has long been embedded in the legacy of African Americans. Yet, Black communities are often forgotten in conversations about donors and giving. There are a variety of factors that play into why this is the case. Black families were subjected to years of slavery, segregation, and discrimination and continue to face systemic racism—including in the financial system. Not only did slavery and Jim Crow put Black families' ability to accumulate wealth centuries behind that of white families, but discrimination entrenched in public policies shaping housing, education and financial systems have led to a situation where many Black families are just now building their wealth. In spite of this, African Americans are still giving at higher rates, often through vehicles outside of the traditional foundation model. Black philanthropy is impactful, and it is important that we elevate this legacy.

In order to discuss family philanthropy within the Black community, we also have to acknowledge that "family" often extends outside of the traditional use of the word. Yes, sometimes family means your blood or adopted relatives: parents, siblings, cousins, grandparents, and so on. But in many circumstances, family extends beyond the people that share your DNA. Family isn't just the people who grew up in your house or the people that have a clear-cut spot in the family tree. People often create chosen families that do not have formal labels or titles. This is especially true for Black communities.

Liz Thompson, co-founder and president of The Cleveland Avenue Foundation for Education, shares what legacy means to her as a Black philanthropist:

“As a proud Black American, I live the duality that is our narrative. I am simultaneously frustrated and angered by how we must constantly fight for the equality that is promised through our constitution, while being immensely proud of how we have prevailed and endured despite the unimaginable challenges our ancestors faced. This undying perseverance in the face of great adversity coupled with a tireless optimism for the future is the legacy I am proud to carry in my spirit. I also feel called, as a philanthropist, to pay it forward and pass on the blessings that we have received because we live by the words…for everyone to whom much is given, from him much will be required; and to whom much has been committed, of him they will ask the more.”

Legacy isn’t just about honoring the past, it’s also about being impactful in the present and creating a better future. Even though the narrative in the philanthropy sector may say otherwise, current statistics show that Black people are giving to causes even more than other racial groups. According to a Diversity In Giving Study, African American donors say they give an average of 13 percent of their income to their place of worship, compared with 9 percent of donors overall. A study from the W.K. Kellogg Foundation and Rockefeller Philanthropy Advisors also shows that almost two-thirds of Black families make charitable donations, worth a total of about $11 billion a year.



Gabriela Citrone and her family

Leverage, Relationships, & Commitment

Gabriela Citrone,
Outreach Director, Citrone 33

Gabriela moved to Pittsburgh straight out of college to work with her family's philanthropy, a very hands-on operating foundation. While she grew up in Connecticut, her family is rooted in Pittsburgh, where they are minority owners of the Pittsburgh Steelers.

"The network and ability that we have to open doors because of our name—we're well aware of it. We use it to reach people and elevate the work that's already being done out there. We are very strong on our partnerships. We haven't been working in the field of mental health, so we're not experts, but we are experts at creating a movement and getting people who are the experts elevated.

We're aggregators; we bring people together and work on what's being done and bring it to life and the eyes of the city. Pittsburgh is a small enough city that we and our partners can truly get things done, and large enough that we can make a real difference—that our impact is considerable.

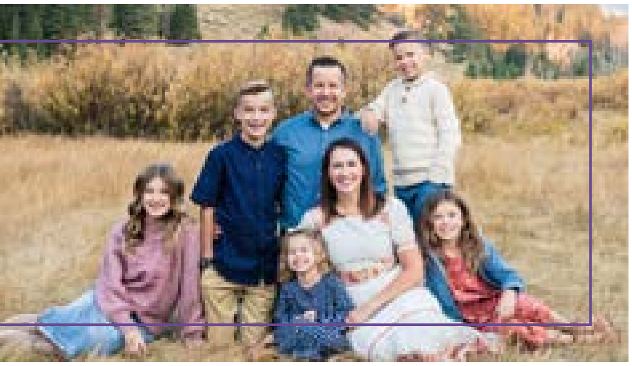
We have a lot more assets than our dollars; we can offer people as well as financial resources. We want to continue to give back to our community in a variety of ways and inspire others to do so as well.

One way we're doing so is by engaging in storytelling so we can effectively reach people and get them involved in the work we're doing and the problems we are trying to solve.

I'm very involved with next gen philanthropists; we want to roll up our sleeves and get involved, we want to get on leadership councils and learn. We may not have the ability to give big yet but we want to be engaged so we can give in ways that are effective and sustainable.

Within our family's philanthropy, we'll each get our own mini fund or foundation and we can give to what we're passionate about and don't have to argue about it. It's exciting; we can come back and share successes and failures and learn from another. I work really closely with my mom and dad and siblings.

For my family, our legacy lives on with our partners, the organizations, and the people we support and the engagement we have; our willingness to take risks and not be afraid to fail."



The Millerberg Family

The Heart of Giving

Amanda Millerberg

Amanda and her husband Spencer live in Salt Lake City with their school-aged children. They are in their first few years as significant philanthropists, taking a hands-on, open-minded, and exploratory approach to the endeavor of giving. "The best advice I ever got was to just start. Just start giving. Just start giving your money and time."

"We're roughly two years into giving—I'm a serious newbie. This has been a journey for me. We have tried to develop giving values and I schedule blocks of time to research, interview, and visit organizations. The opportunities haven't fallen into my lap; it's work. I look at it as if I'm going to work".

The Millerbergs are choosing groups and opportunities that fit both their families' values. "My husband and I don't necessarily have the same passions, but we have the same values about how we want to impact our society. We both grew up in amazing homes where we were taught to show kindness to all those we encountered and help those in need. My husband would often walk around his neighborhood with a wagon of food his mom had prepared for neighbors. My father spent hours helping others fix plumbing in their homes. These experiences shape our values as parents and philanthropists."

While the idea of our "Legacy" is still not defined, I want to be a purposeful and impactful giver—to help up, not just hand out. As we condensed our ideas and experiences to values, we hope people will think of the Millerbergs as three things: kind, hardworking, and faithful. We often talk to our children about our family in this way—what three things does it mean to be a Millerberg. **In that way, we hope to encourage our kids to give, but not limit them to our preferences. I want to encourage their own areas of passion within these broader values.**"

One example of our focus is self-reliance. Covid-19 created many unique opportunities, and we choose to support organizations who helped in closing the childhood education gaps and bridging food insecurities. Further, we love finding groups we can both financially and personally be involved with. It's rarely just a check with us—you more often get "us"—our services, work, and introductions to others. This casts the net wider and creates a bigger impact for those receiving and more people to help.

Also, in the past we did a lot of our giving anonymously, but recently, we have changed our approach. We were at a concert once and saw a friend's name on the list of donors. Because of that, we were then more likely to give—and it changed our thinking. Now, we realized that putting our name on something encourages others to give. For example, we were excited about the new Junior Achievements building, so we put our name behind a major donation and that allowed us to then send our introductions to our network and further increase the support behind the program.

"The best advice I ever got was to just start. Just start giving. Just start giving your money and time. The more you do, the more exposure you have, the more people you meet, the more you learn what needs are out there. The more you learn about yourself. Philanthropy is about a way of life...and we hope it will be a way of life for our children and generations to come. But for now, it's really just the beginning of our giving story!"

Desai Family

Doing, Learning, & Interconnecting

Lopa Desai

Lopa is a younger philanthropist living on the West Coast who has parlayed her energetic, inquisitive nature and commitment to continual learning and connecting into her approach to giving.

"We don't think about giving as our legacy, we think of it as our duty."

"We grew up around philanthropy—we saw our parents give, and often give anonymously. There was a focus around, 'we've been lucky, we have opportunities.' My parents immigrated to the US and came from very humble beginnings. They relied upon the help and generosity of others in their network, whether their family or community. They understood firsthand how others' helping and caring were part of their ability to grow and become who they wanted to be.

We give through DAFs or individually on our own; we don't have a foundation. A few family members also give through a community foundation where they live. We like it because it's flexible; no one has to manage it or worry that we're doing it properly.

Our philanthropy mirrors our family dynamic. There's a lot of trust and love and concern, and also a lot of independence.

I'm just a doer. If someone comes to me and says I'm trying to do this and can't, my first instinct is, "what can I do, how can I help?" A colleague came to me early in the Covid-19 pandemic with the opportunity to get one million N-95 masks to the States, but he did not know how to get them into the right hands. I reached out to people I know in philanthropy, including Fidelity Charitable, worked the phones, and landed with an incredible organization in my backyard here in California that I never knew about called Direct Relief. It was created by Holocaust survivors 70 years ago. They had a network already in the US that they were activating. They became great partners. And we also created opportunities for other donors who wanted to learn how to help in real ways to educate themselves. We weren't the biggest effort, plenty of people were doing stuff, but we started learning—and became a coalition of the willing who aim to help people who want to equip and not harm.

I think we overthink things and focus too much on doing things alone rather than leveraging our communities to accomplish things together. Just because we have the ability to write really big checks doesn't matter—that becomes a me-me-me thing. We are all so connected, there's so much low- hanging fruit that is just opening a door, just bringing people together.

We don't think about giving as our legacy, we think of it as our duty.

A deep undercurrent for us is this idea that you have to work and give and push for the world you want to live in—it doesn't just exist on its own.

It all starts with intent. If you give for the right reasons you will make an impact. We should all be smart about how we give, but at the same time, if you give for the right reasons, you will make a difference.

My hope for where these conversations are going is understanding our world's interconnectedness."

Service, Equity, & Justice: Legacy Through a Values Lens

Kelly Nowlin, Trustee, Surdna Foundation

The Surdna Foundation was founded in 1917 by John Emory Andrus. To this day, family stewardship of the Foundation is guided by John Andrus' commitment to "serving those in need." Kelly is a fifth generation Andrus family member who has been actively engaged in her family's philanthropy for over 20 years. Kelly chairs the Andrus Family Philanthropy Program, which is responsible for outreach to, and engagement of, nearly 500 Andrus family members.

"Legacy comes to life through being the most effective and informed stewards we can be, while inspiring younger generations to embrace values of service, equity, and justice."

Our guiding values are inspired by the past but relevant for our actions in the present. We seek to constantly sharpen our skills and evolve our strategies by centering and learning from the voices of our grantees and the communities we care about.

Six generations of the Andrus family have engaged in one or more of our philanthropies. The concept of legacy is rooted in the humility and gratitude that multiple generations of this family have for the opportunity to be a part of something bigger than all of us. We listen and learn from all generations and this connects us, inspires us and builds momentum for our work, now and in the future.

There is great value in understanding the story of the founder and what values and circumstances inspired them to create this philanthropic legacy. Curating and sharing this history of our Founder and the evolution of the Foundation has been an important exercise and should be woven into all philanthropic programs that engage family in some way. This history connects us, orients new family members and can be an ongoing source of guidance and inspiration. While this story grounds our family in this work, we are fortunate in that it also empowers future generations to adapt, evolve and innovate to address the issues pertinent to current times.

The idea of legacy doesn't have to be a rigid, prescribed mandate. To be effective philanthropists requires that we address the issues of our day, understand the history of systems and policies that have led to racial inequality, listen to those most impacted by the issues we are supporting, and learn, take risks, innovate, and persist. **As a social justice foundation, we believe our Founder would be proud of how we've honored his values, done our best to meet the moment, and remained steadfast in our commitment to racial justice."**

Courtesy of the Hill-Snowdon Foundation

Power, Privilege, and Impact

Ashley Blanchard,

Trustee, Hill-Snowdon Foundation

The mission of the Hill-Snowdon Foundation (HSF) is to work with low income families and communities to create a fair and just society. HSF seeks to accomplish this mission by providing grants to organizations that work directly to build the power of low-income families; leveraging our and others' resources; and promoting opportunities for learning and growth. The Hill-Snowdon Board includes both family and non-family members. Ashley is a fourth generation family member and trustee and works as a consultant to nonprofit organizations and foundations. Ashley was previously the founding co-chair of the Council on Foundation's Next Generation Task Force.

"Legacy should be dynamic, and there are different kinds of impact—the legacy of the change you want to see in the world, the legacy of the opportunity you have to do this together. Come up with something together—sit down and talk about it. The odds of success by almost any measure will be better if this is something you build together.

The thing that binds us together was a commitment to core values, and a commitment to learning together. So when I think about legacy, it was us thinking about "let's think about something we can all do together in the world that has value. How can this foundation contribute to change? What kind of foundation do we want it to be? That's what we're committed to.

More broadly in our field, I'm seeing a new awareness that family philanthropy is part of an unjust, rigged system. I see a personal reckoning for family members who are forced by this moment to take action—the sense that we should spend more, we should spend differently, etc. And you can't bring up these questions without looking at the huge structural justice issues embedded in our system of personal wealth. People who never thought about this system ever are now thinking very differently about this. People giving COVID relief funds are applying racial equity criteria to this, which six or nine months ago would have been impossible to fathom for them.

I'm optimistic that some of the attention to racial equity, some of the practices will change for the better. I'm also hopeful that people will be more aware of their wealth and privilege and be a little more empathetic. There is a tale of two quarantines; people are more acutely aware of the economic divide than before.

We're doubling our payout for the next three years."

Cofounders John and Helena Raskob

A Living Legacy

Kerry Alys Robinson,

Trustee, The Raskob Foundation

The Raskob Foundation for Catholic Activities, Inc. was established in 1945. Based in Delaware, the Foundation is international in scope, accepting requests from around the world. Kerry is a member of the Board of Trustees. "This year our family foundation celebrates 75 years. Five generations of our family have been actively involved in the foundation's service and to date close to 100 direct descendants of the Founders are involved in a voluntary, non-remunerative way in the activity of grantmaking."

Legacy means a great deal to our family and we use the word regularly.

We begin our trustee meetings and annual membership meetings with a snapshot from history that speaks to legacy. As a family we believe our legacy is to come together as a family in service to the global Catholic Church and the Church's many religious and public ministries through the instrument of philanthropy. In being outwardly focused in service, we grow closer as a family.

Our core values include generosity, service, faith, a commitment to making the Church and world better, more just, more peaceful, and more merciful.

Part of our legacy is a remarkable commitment to original donor intent. At the same time, one of the defining characteristics of our family foundation is a commitment to the youngest adult members of the foundation. We entrust genuine responsibility in the youngest members of the foundation and encourage them to chair committees, to stand for election to the board, and to represent the foundation and family at convenings and conferences.

At the beginning of every trustee meeting (five times a year) and our annual meetings we begin in prayer followed by a Legacy Reflection. In this manner we shed some light on a moment of historical significance to the family and to the foundation. We learn about our founders and their children and descendants in relationship to the mission and work of the foundation. It is both educational and designed to name and reinforce our collective commitment to legacy as a family.

It is incumbent upon all of us to enter deeply into conversations about power, race, and wealth. We have a motto within the family, "everyone has a piece of the wisdom." Listening deeply, presuming goodness in each other, having honest conversations, fostering an atmosphere of candor and charity are important. We also discuss ways our grantees might be responding to the importance of these topics. And we try to emulate what we advocate."

Photo by Kate Lord Photography; Courtesy of the Summit Foundation

Roger, Lex, and John Sant: Three Generations, One Family

Roger and Vicki Sant established the Summit Foundation to promote the health and well-being of the planet—to create a world where people can thrive and nature can flourish, and one is not sacrificed for the other. Summit currently makes grants to achieve gender equality for marginalized women and girls in Central America; to conserve the Mesoamerican Reef as a healthy, productive and sustainable ecosystem; and to radically increase the sustainability of US cities through transformative climate action.

Through conversations with three members of this giving family, beautiful similarities—and differences—emerge in their perspectives. It's a lovely real-world example of how the notion of legacy develops through the generations. The third generation points to external impact with an approach inspired by his grandmother, while the first and second generation talk about the internal focus (the act of giving, and the spirit of philanthropy). What can we learn from these evolving perspectives?

"We wanted the principle responsibility to go on, 'of trying to make the world a better place' but we didn't worry a lot about the rest. We just felt so good about our kids that we made it perpetual; they were displaying the values that we hope would carry on and they're putting their own spin on it."

–**Roger Sant**, Founder and Board Chair

"In a basic way, legacy is about what we want to pass on and how we want the people we love to be remembered. It's about presenting what we stand for both individually and as a family and what we want to represent in the world. That's something that was true of my parents, and that they've tried to help all of us understand, and was a great gift from them: the idea that charity is not a form of self-promotion or vanity. Rather, you're really lucky if you can be of help when help is needed.

I hope that the way that my children think of my mother and father—as people who are and were kind and optimistic—is the way my grandchildren will think about me. **There's an inherent concept of optimism in being charitable, believing that things can be improved, and that the world can get better.** There is a fundamental sense of optimism in what we do that is very authentic to both my parents and I hope that my children and grandchildren will think is authentic about me."

–**Lex Sant**, President and second generation trustee

“Depending on where you place resources, impact can vary in its results. But if our intuition is switched on, we can have real results. It’s the areas where human goodness can be amplified and can be contagious. This feels like it comes straight from my grandmother. The way I think about her life philosophy and the foundation over all is that there’s this optimism about human goodness and the power it can have, that’s the element of faith at the center of the foundation. **If you with your own goodness seek out the goodness of others, there’s this explosive thing that can happen. It’s a powerful idea, an underrepresented idea in foundations. Perhaps part of our legacy is this piece of faith.**”

–**John Sant**, third generation trustee

Practical Matters: Strategies, Tips, & Tools for Family Engagement in Legacy

Perhaps you've been inspired by the stories above, or intrigued by the Legacy Levers. This new framework does represent a notable shift in how we think about legacy—from *what we are inheriting* to *why and how are we giving*. This shift invites—and perhaps even requires—proactive engagement across generations and ongoing thoughtful conversations.

There are many concrete ways to engage in this process and these conversations. Read on to learn more about practical strategies, tips, and tools to help you and your family explore—and live—your legacy.

The first step is simply exposing your family to the work. For a small family or a family with young kids, this might simply be ongoing conversations about where and why you give, site visits, and volunteering together. For large, geographically dispersed families, this might be a regular newsletter, virtual "armchair" visits with grantees (e.g. where they join the family over video chat), or periodic family gatherings or retreats to learn about and explore the family's giving together.

Impactful philanthropy tends to lead to engaged families. In the book *Generations of Giving*, which looked at 30 multi-generational family philanthropies, the authors posit that the more effective the giving, the more engaged the family is going to be, and then this becomes a self-perpetuating cycle.

In the following pages, explore strategies for both engagement and dialogue—they are deeply interconnected elements of a joyful, change-making philanthropic family endeavor.

Meaningful Legacy Requires Making Space for Next Generation Influence

Times change, and giving families continually have to navigate balancing the past with what they see as emerging needs in the world today, as well as with the passions of those involved in the giving enterprise. This can be a productive tension, leading to new and exciting giving areas and understanding of legacy. Giving families have changed their mission, programs, priorities, and way of operating to meet challenges or opportunities never imagined by the initial donors, evolving their legacy along the way.

New priorities and strategies may be in response to political/social change, demographic changes, and even technological changes—creating both new needs and new opportunities. And as new family members get involved and emerging leaders step up, they bring new ideas and passions that they want to see recognized in family philanthropy. Honoring those new ideas is often critical for gaining investment from those family members.

For Kerry Serini McHugh and her family, who give through the Helen J. Serini Foundation, all generations were involved in the conversation about giving focus from the get-go.

"My siblings and I have been involved since day one, when we were 25, 23, and 16. My dad sent out very lengthy questionnaires when starting the foundation asking what kind of things are you interested in, locally, internationally, etc.—it was a very collaborative process. I still have those questionnaires on file somewhere!"

Even in this foundation's relatively young life, they have already shifted and refined their focus as they have learned more about the community's needs—and their own passions.

Heising-Simons Foundation Vice Chair Caitlin Heising shares, ***"My parents created space and a new program area in response to my areas of passion. I probably wouldn't be as involved if they hadn't. If I'd come in and not had any value added, it might not have been super appealing."***

As a practical matter, creating space for the influence of young adults and younger family members can make the staying power of your family's philanthropy more compelling to family members from all generations—thus creating a stronger sense of legacy.

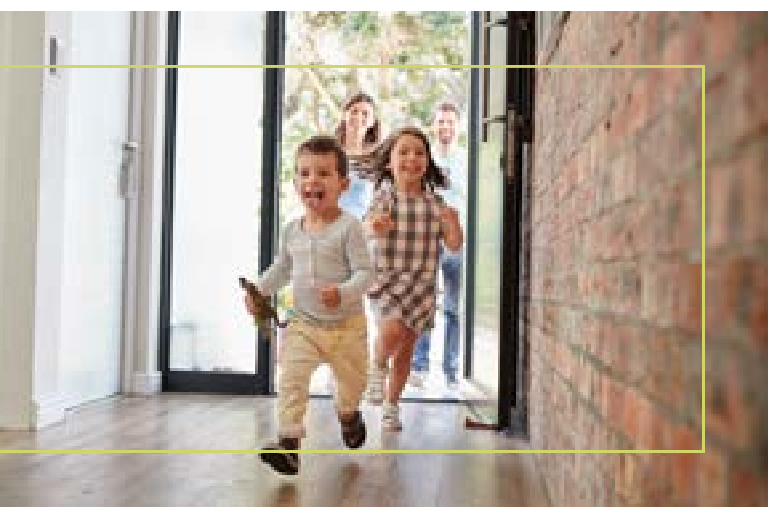
Consider this reframe shared by Kerry Serini McHugh:

"As a younger philanthropist, my advice to other giving families would be that if multiple generations are or will be involved, think about how your giving is multi-generational rather than passed down in a prescribed and prescriptive way. I don't think you're going to have people engage meaningfully in an institution they don't feel a part of."

Connecting Family Engagement to Building Legacy

"At one family retreat, we asked each grandchild to prepare a 3-minute presentation on a nonprofit they were interested in, and this gave us the chance to learn about the causes that matter most to our grandchildren. It was so interesting to learn about their world view and passions."

–**Elaine Martyn**, Fidelity Charitable



Building family engagement in giving is about building legacy. It's about the invitation, and not letting notions of legacy get in the way of bringing in young people or other family members who might think differently about the world. And it's about open lines of communication.

Here are tips for engaging family in ways that are welcoming and inviting, and that do not position legacy as a limiting force. This is just a start; there are many wonderful resources available on this topic.

- **Start early: invite young people to the table as thoughtful and equal contributors early and often!** NCFP and Fidelity Charitable have an abundance of resources available on how to meaningfully engage youth in giving, and many families are doing so with great joy and success.

- **Keep the door open by offering flexibility and a multitude of ways to be involved.** This will help create space for family members to engage when and how they are able. Creating lots of different avenues for involvement and finding ways to tap into the skills and interests of family members are demonstrated strategies for successful family engagement.

- **Participate and offer site visits or "armchair site visits" (where grantees meet with your board and other interested family members, either virtually or in person).** This helps create connections to the work on the ground and shares the family's impact and legacy for a broader swath of family members.

- **Volunteer with grantees or other nonprofit organizations.** Whether on a family trip, or in different family members' home communities, the opportunity to roll up your sleeves together can be an educational and enjoyable bonding experience for all generations.

- **Offer discretionary grantmaking by creating small pots of money for members to support personal passions outside of a family's giving focus.** Sharing this opportunity with the other members of the family may help invigorate family engagement. Discretionary grants provide a chance for family members to flex their giving muscles, build relationships with grantees, and make the giving feel relevant and personal. It's also a neat way for individual family members to think about their own personal legacy as complementary to that of the broader family giving.

  If your family is interested in starting discretionary grantmaking, it's helpful to have a clear process and policy. Samples and examples are available in the NCFP Knowledge Center.

- **Periodically hold family retreats to create space for big-picture questions and conversations about giving, impact, and legacy.** This creates quality time for family members to connect and learn about philanthropy together.

ARMCHAIR SITE VISITS: A GAME-CHANGER

For one giving family who fund grassroots organizations around the world, the founder/donor had the vast bulk of the family's international travel experience and relationships. The board invited a grantee in Kenya to share an update on her work and journey as a medical student at the family's retreat over video-chat, and this led to an authentic connection across the world, and a heartfelt, learning-filled conversation. It was a game changer for the family and a tradition that has continued to this day.

"I see myself as "planting possibility." I don't necessarily need or want my kids to do what I do in seeking to make the world a better place, but I want them to try to make the world a better place in their own ways."

–Family Foundation President

"In many donor family meetings we do, families say the greatest value is in the stories that get shared."

–**Elaine Martyn**, Fidelity Charitable

FIDELITY Charitable®

Fidelity Charitable has great resources available to giving families.

A few of the tools available are:

Gift4Giving eGift

Share your passion for charitable giving with a Fidelity Charitable Gift4Giving eGift. It lets your friends and family support charities using your Giving Account. It's the perfect gift for any occasion, and helps you inspire others to make a difference.

TIPS Cards

As you embark on your philanthropic journey, *TIPS for Navigating Giving* allows you to explore various dimensions of giving through Tactics, Inspiration, People, and Strategies. The questions you ask as a philanthropist can be your most powerful tools for change. *TIPS for Navigating Giving* inspires self-reflection; prompts conversations with family, grantees, and philanthropic peers; and uncovers key elements that shape your philanthropy.

- **Ask** reflective questions to learn more about yourself and others.
- **Gain** insight that you can translate into action.
- **Start a discussion**. Each question is designed to prompt an open-minded exploration and a constructive exchange.
- **Share** thoughts and ideas that emerge.

Some sample questions are below—use them to inspire reflection and conversation!

People

- Who do you consider to be a role model for your philanthropy?
- How would you like your family to be involved in your philanthropy?
- What do you want to do, but can't do alone, in philanthropy?
- If you could set up a philanthropic fund for someone, who would it be?
- How do you balance requests with your own intentions for philanthropy?

Inspiration

- What's your first memory of giving?
- If you could solve any problem, what would it be?
- What kind of philanthropist do you want to be?
- What challenges have you overcome that influence your philanthropy?
- Are you proud of a recent gift you made?

Tips & Tools for Inspiring and Effective Family Dialogue About Legacy

There are myriad tools and approaches available to help giving families navigate the conversations connected to multi-generational engagement and legacy, and to support honest and open communication on this big topic. Here are a few to consider:

- Engage a facilitator as a neutral, trained party to help create a safe space for open, productive conversations in your family group
- 21/64 offers wonderful tools, including values cards, conversation starters around what you are inheriting, picturing your legacy, generational understanding, and more.
- Use catalytic questioning with the goal of a storytelling experience. Give people a few thoughtful questions to prompt memories, stories, and ideas. There are ideas throughout this workbook.
- Tap a philanthropic advisor, family friend, or other family member (perhaps the grandkids) to conduct an interview with founder/donors; some families have found creating a short video to be a meaningful way to document such a conversation.
- One mom and her adult children went to a nonprofit pitch session and each chose one project they were inspired by and talked about why it moved them.
- Talk with others from other giving families to learn from their experiences. Not sure who to talk with? NCFP Friends of the Family can contact NCFP for an introduction to other families.

Navigate inevitable and unexpected conflict with skill and care. Take a deep breath, and then see NCFP's Issue Brief on Addressing & Managing Conflict in Family Philanthropy.

10 Questions to Help Start the Values Conversation

Excerpted from "10 Questions to Help Start the Values Conversation" by Suzanne Hammer, Founder of Hammer & Associates.

If you're unsure of your values, look at how you (and other family members) spend your time. It's easy to "say" you value something, but if you don't actually give it any time or attention, how important is it, really?

Getting clear on values will help you "talk" your walk.

Here are 10 questions to help you start the values conversation:

You can answer these questions on your own, or bring them to your family meetings.

About Values...ask yourselves:

1. What does the word "values" mean to me personally? As a family?
2. What's most important? What are some of the values that have guided and sustained me through life? (Jot down freely whatever comes to mind.)
3. Where did these values come from?
4. What family stories or role models have instilled my values and worldview?
5. How do these values show up in my actions? In decision making? In the way we relate to one another?

About Family Giving...ask yourselves:

1. Why does our family exist?
2. What is the purpose of our wealth?
3. What change would we like to see in the world?
4. How would we like to be remembered?
5. What are the most important values we share in common?

These questions may seem simple, and yet they can evoke rich discussions—ones that may bring your philanthropic mission and goals into focus. And holding these important conversations now may help you and your family members stay inspired over time.

Courageous Conversations

Excerpted and adapted with permission from [Pro Tips for Courageous Conversations] by Edie Irons, Social Transformation Project. For a wonderful array of free and accessible tools and resources about how to have Courageous Conversations, check out the Social Transformation Project.

Whatever tools are used, what's most important in navigating legacy is ongoing communication.

Families who have successfully engaged across multiple generations report that open, candid, and ongoing communication is critical. From sharing about why giving is important, to creating space for asking questions and offering flexibility, to talking about the future passing of living donors, all of this work is made more meaningful and doable thanks to courageous conversations.

Says one emerging leader, "Our conversations about legacy really started as my parents were rethinking their will—what will the foundation look like after they pass away? Yes, these are somewhat morbid conversations to have but it's absolutely been worth talking about while they're alive and lucid. Do we spend down? Do my sisters and I steward it? Do we want to own it—is there interest? And if not, we need a different succession plan. That's really how it started. Backing up, do we want to be trustees of this family foundation? What does this mean, and how invested do we want to be?"

What do we mean by courageous conversations and how do we make them work?

You know the feeling—anxiety or dread about a conversation you know you should have. What should I say? How will the other person react? What if...? You wish you didn't have to have the conversation and that the problem will just go away, but avoidance usually makes it worse.

Leaders and change agents face these conversations all the time: managing staff performance, struggles with the board, negotiations with funders and clients (or grantees), or conversations about power and privilege can all trigger these feelings.

And of course, courageous conversations are a particularly complex beast within the context of family philanthropy, with the long history, emotional ties, and multitude of roles we bring to the table. To navigate courageous conversations in family philanthropy with care and dignity, try to prepare thoughtfully, to be clear which hat you're wearing when, and to be aware of the power dynamics at play.

However challenging, the greatest risk and pitfall for giving families is simply in not having the needed conversations.

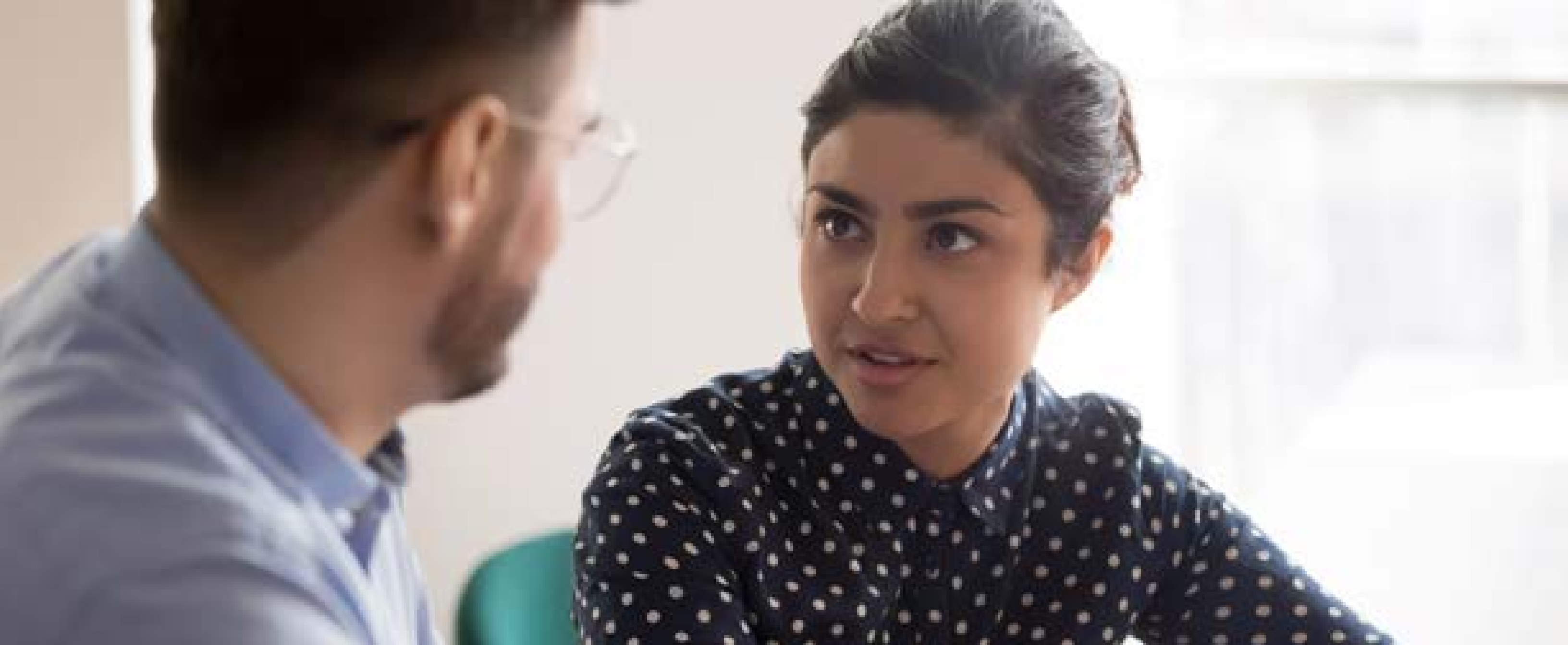
Mary Phillips, who has worked with hundreds of giving families through her role at GMA Foundations in Boston, shares these tips around communicating clearly and having courageous conversations.

- Live your legacy in full view of your descendants—communicate and explain what you're doing. Share information and power from a young age. Involve your kids and others who will be asked to carry on your giving while you're living and active and provide them the chance to work together as you model your legacy.

- Try to find peace with the fact that what you think your legacy is may be interpreted differently by other family members and future generations.

- Provide very clear communications—set very clear expectations for what is going to happen when you're no longer there. For families of wealth, sometimes that means talking to your descendants about their own inheritance, and why you've chosen this chunk of your estate to go into a charitable vehicle. These can be hard conversations to have but a lot of what's important to you—your values, where you've found meaning in life, and your hopes for your family's philanthropy—will come out of those moments.

The notion of courageous conversations invites us to a paradigm shift: rather than necessary evils, these conversations are critical opportunities to advance our work and mission.



Discussion Modules

There are many ways to approach talking about philanthropic legacy. We find that legacy is often interwoven into conversations about values, impact, generational transition, succession planning, and strategy—that is, how a giving family wishes to do their work and to be known. There are many entry points, and many meaningful and effective ways to explore the topic of legacy.

Some of the core questions around legacy include:

- What values guide and ground our giving?
- What goals do we have for our shared philanthropy – for the communities and causes we serve and for our family?
- What are the geographic places that matter to us? Are there causes and issue areas that are particularly important to all of us?
- How does the element of family play into our giving, past, present, and future?
- How does the way we do our work – in relationship with one another, in partnership with grantees, in long term giving or advocacy – reflect our desired legacy?
- Who are we as a giving family? Who have we been and who do we wish to be? What do we want to be known and remembered for?
- How are we thinking about concepts such as equity and racial justice in relationship to our family's legacy?

- What are our intentions? What is the compass point our approach and strategies points towards?

On a practical level, here are just a few of the ways we've seen families approach these conversations:

- Include time at each board meeting, even if just 30 minutes, to explore one or more of the above questions
- Hold a retreat—one to three days away together to dig deep in a more time-generous and spacious way into the topic of legacy and the sub-topics below
- Hold monthly virtual meetings of 75-90 minutes over a series of months to discuss these matters

To help families begin or continue legacy conversations with a modern framework, this short guide offers a collection of ten discussion modules on a wide variety of questions related to philanthropic legacy. Each module can be explored in 45-90 minutes, can expand or contract to be even shorter and longer, and can be adapted for in-person or virtual gatherings. The modules can work with groups of 4, 8 or even groups of more than 20. You can use each one independently or stitch them together for a set of legacy conversations at a retreat.

These modules have been crafted specifically for the NCFP community drawing on the experiences, stories, and actual meetings and retreats of giving families from around the US. They were developed by Janice Simsohn Shaw, author of Legacy in Family Philanthropy: A Modern Framework and related publications and a frequent family foundation facilitator. Many of these modules reflect sessions she has designed and led with philanthropic families around the country. Janice thanks them for their trust and generosity.

Discussion Modules

Designing Effective Meetings

Each of these discussion modules uses the simple framework of POP – Purpose, Outcomes, Process.

Purpose: Why are we having this conversation?
Outcomes: What, specifically, do we hope to gain or come away with?
Process: How do we actually have this conversation? Step-by-step instructions.

We encourage you to take these modules and adapt them for your own circumstances; our hope is to make exploring this sometimes-daunting topic more accessible and to offer you a space for meaningful conversation.

Five tips for effective meetings:

- Tap a facilitator, whether from within or outside your family, to hold responsibility for keeping the meeting on-time and on-point and to draw out all voices in the group.
- Be realistic about time—any one of these topics can be explored in 45 minutes or over a week… or over a lifetime for that matter! Use the time you have wisely and you'll be productive.
- Make use of a variety of modalities to appeal to different learning and reflecting styles, from individual journaling to paired conversations to large group. Pairs are a great way to draw everyone into conversation, simultaneously. Use breakout groups, even in virtual meetings.
- Hearken back to the POP to stay clear on the meeting's goals and structure.
- Open and close thoughtfully. The tone you start and end with matter mightily.

For more practical tips on designing and facilitating effective family meetings, see NCFP's guide *Meetings Matter: How to Plan Effective, Efficient, and Enjoyable Family Meetings*.

Do We Need an Outside Facilitator?

This workbook has been designed to support giving families in facilitating their own conversations about legacy. With that said, only you know when it makes sense to tap an outside facilitator for their help!

For some meetings, bringing in an outside facilitator can be tremendously helpful—they bring expertise in meeting design and facilitation, can be responsible for keeping everyone on-task, and free up the family (and staff, if applicable) to be fully present and engaged in the work at hand. Asking your own staff members to serve as facilitators can be effective at times, but it can also put them in a tricky spot navigating family dynamics and different roles.

Why bring in an outside facilitator? Sometimes families do so when issues are contentious or complex—and often when they simply need someone else to keep them on track. One family recently tapped a professional facilitator for a meeting with their two college-aged daughters saying, “we’d just dissolve into giggles without someone keeping us on task!” Another family, in the early stages of shifting into the next generation of leadership, simply found themselves overwhelmed with the many discussions that needed to take place and asked for help in the process of defining their shared values.

Legacy Module 1. Values and Legacy

Purpose:
To identify the core values that guide and underpin your family's philanthropy

Outcomes:

- Time for individual and group reflection, exploration and discussion on values
- Clarity around key values that are shared in your family group
- Ideas about how to utilize and activate these values in your family's giving

Process:
Mix of individual, paired, and full group work

Materials:
Recommended: 21/64 Motivational Values Cards

Opening Reflection:
Begin with each member of the group going around and sharing their response to an opening reflection:

- Why are you glad we are talking about values, and what's one thing you hope we get out of this conversation, or one way it benefits our work together or giving moving forward?

  OR

- What's one value that's deeply important to you personally, and how has it helped you make an important decision in your life?

Why begin with such a question? Opening thoughtfully in this way invites each member of the group to personally identify the benefits of—and investing their time in—discussing values.

We recommend that each person set a timer for the same amount of time (1-2 minutes) so that you open with hearing each of your voices and that the group takes shared responsibility for—even in this small, initial way—welcoming one another's unique perspectives and equalizing voices and power dynamics around the (virtual or real) table.

Values Short-Listing Exercise
Framing: Today we will be working on our shared philanthropic values—which will likely have much overlap with our personal values! Together, we will look for commonality, and seek to identify meaningful and compelling values to guide and ground our shared philanthropy.

Activity:
Provide each participant with a deck of 21/64 Motivational Values Cards and point out how each has a word and definition. Take about 10 minutes to individually look through the cards. Select the top five that are important to you personally and that you believe could be meaningful for your family's giving. If there's an important value to you that is not on the cards, add it!

After each person has pulled their top five, work in pairs, sharing which five you've selected and why. Together, work to prioritize a total of three values to bring forward to the rest of the family for consideration and discussion. Then come back together as a family, sharing the three values each pair has selected.

Discussion:
Vote to prioritize if needed. Some giving families find a shorter list of 5 or fewer as being most helpful, while others have a longer list of 7-10 values or more that guide their work. Be sure to come up with a pithy definition of each (from the cards or beyond) to help ensure clarity and shared understanding.

Activation:
Finally, explore ***how you wish to utilize and activate these values in your giving***. How will these values guide your grantmaking and operations and how you work together as a family? What are the behaviors, attitudes, and actions that would correspond to each one? This important final step helps take values from nice words and bring them into vital, living practice. Values are a central part of legacy—start here.

Legacy Module 2.
Storytelling and Lesson-Learning: A Cross-Generational Exploration

Purpose:
Ask and listen across the generations to bridge shared understanding and notions of legacy.

Outcomes:

- Time for informal, one-on-one, thoughtful question-asking and careful listening
- Cross-generational connections, especially in larger families
- Sharing of stories of motivation, pride, success, learning from failure, and questions

Process:
Individual reflection on questions, one-on-one speed networking, full group discussion

Materials:
Notepads and pens

Activity:
Open by sharing the POP above. Then give everyone 5-10 minutes to write down questions they have for other members of the family, particularly those of other generations. Some questions we've seen emerge in other families are:

<u>Questions for founding or older generation:</u>

- Why did you start this giving enterprise in the first place? What was your motivation and hope?
- What are a few grants you're particularly proud of, and why?
- What are a few mistakes you've made?
- What have you learned along the way? Who have you learned from?
- What useful gifts, skills, and perspectives do you bring to the work?
- What makes you excited about getting other generations involved? What makes you nervous?
- What are some of your biggest hopes for the future?
- What haven't I asked that's important to you that I hear?

Questions for younger/emerging generation:

- Why do you choose or seek to be involved in our shared family giving?
- What are a few grants the philanthropy has made that you're particularly proud of, and why?
- What have you learned so far? Who have you learned from? Who do you hope to learn from?
- What useful gifts, skills, and perspectives do you bring to the work?
- What is hard for you about being involved? What is easy? What brings you joy?
- What are some of your biggest hopes for the future?
- Are there ways you think we might want to consider changing how we work, or what we give to?
- What haven't I asked that's important to you that I hear?

Hold paired conversations and be sure each person gets to ask the other one a few questions that are important to them. Change partners after 10-15 minutes, speed networking style. Depending on how many members of your group and how much time you dedicate to this conversation, you may have the chance for everyone to speak in a second pair. It is important to note that this is not a "learn from the elders" conversation—rather, it's "learn from each other."

After these paired conversations, it can be beneficial to talk in generational groups—or simply return to the full group.

Discussion:
What was striking about the conversations? What surprised you? What did you learn? What will you take with you moving forward?

Sharing stories in this way allows a group to share and meld experiences across individuals and generations as you build a cohesive sense of narrative, purpose, and legacy.

Legacy Module 3.
Headlines of the Future

Purpose:
To imagine and articulate what success would look like for your family's giving.

Outcomes:

- A chance to dream and vision individually and collectively
- Informal articulation of what success might look like and who key audiences are
- Findings can inform your goals and orient your strategy and giving accordingly

Process:
Individual journaling/drawing, followed by group sharing and discussion

Materials:
"Headlines of the Future" worksheet, pens, pencils (and markers if you're an artsy group)

Please note that this particular activity can be useful for talking about your philanthropy overall, or about a particular giving area in which you wish to make change.

Activity and Discussion:
In advance (or collectively in the moment) decide for what time-horizon you want to envision success, whether 5, 10, 25, or 50 years. Provide each participant with a worksheet (a version can be found on the next page).

Invite each family member to take a few minutes to simply dream and imagine in response to the following questions:

What's a newspaper article, (or LinkedIn post, or podcast, or neighborhood newsletter) you'd be proud to read that celebrates the success you were part of? What will the headline be? Will the article talk about your giving? About your grantees or partners? About a change in policy, whether federal or local? What will some key points be? And what visual will tell this story?

After taking 10-15 minutes to fill out the worksheet, go around and each take a few minutes share what you wrote. It's amazing how creative and specific this activity helps people become!

Headlines of the Future can be a great jumping off point to conversations about legacy, as it allows people to articulate what they hope your giving will accomplish in a different way. It can also be a great help in conversations about strategy, impact, and evaluation. It's much easier to chart a path forward once you know where you are headed.

Headlines of the Future

Headline:

Publication Name:

Publication Date:

Main bullet points (few words in bold print that ID key points of article)

Photo or graphic accompanying the article:

Legacy Module 4. Power of How

Purpose:
Learn together about philanthropic strategies and approaches that define how you give

Outcomes:

- Everyone has a chance to be a learner and a teacher
- Explore a number of strategies in an efficient, creative way
- Discuss and begin to identify approaches that resonate with your family's giving

Process:
Pre-work (reading and populating a slide deck), sharing highlights, discussion

Materials:
Skeleton Google slide deck, selected readings

Increasingly, giving families—and especially younger donors—speak about the importance of *how* they do their philanthropy as a central lever in defining their legacy. This module gives you a chance to explore this angle.

Activity:
In advance of the session, create a simple Google slide template with two slides per pair, and assign readings to pairs of family members. Each pair will read an assigned article about one or more topic and come prepared to share highlights via the Google slide deck (think Cliff Notes) with the group, along with reflections on approaches that might be most effective for the family.

You may look at any potential area of interest; some that emerged in the research as common priorities are:

- Long-term flexible support
- Authentic relationships, listening, and trust
- Investing in grassroots community leaders
- Creative tools, from advocacy to time-bound giving to impact investing

By a deadline a few days prior to the session, each pair should do their reading and populate their two slides with key take-aways and recommendations for family consideration. An example template is available here.

Discussion:
In the session, each pair should be given the chance to share their learnings with the group and offer recommendations for approaches that the family may want to consider, as well as ideas for things the family may want to do differently and/or stop doing.

After everyone has shared, take time to discuss together and begin to narrow down some strategies and approaches that resonate and seem a good fit for your family's values and approach to change-making.

Legacy Module 5. Exploring Our Why

Purpose:
Explore why we are each involved, and what's the big why behind our family philanthropy

Outcomes:
- Each individual has a chance to reflect on their own reasons for participation
- Shared understanding of individual motivations
- Discussion of why the family giving enterprise exists, big picture

Process:
Individual reflection, paired conversation, and group discussion

Materials:
Paper and pen (individual), white board or flip chart paper

Understanding what drives us—that is, our "big why" both individually and as a collective—is an important piece of grounding our philanthropic work together as a family.

Activity:
Begin by explaining that in this meeting, you'll be exploring the why behind what you do; share the POP above informally to explain why and how you'll be doing so.

The first piece of this activity is called *The Five Whys*. Working in pairs (you can have one triad if numbers don't quite work), arrange yourself physically so you are eye-to-eye and knee-to-knee. If online, move into paired breakout groups. Do your best to be fully focused on your partner, maintaining great eye contact and using supportive body language and affirmations. Each individual has five minutes that is totally about them, using the prompts below. Decide which partner will be reflecting first.

This is an exercise in repeated asking and listening. The reason? Repeated asking and answering why helps us surface more answers—and often deeper ones. Don't worry if you don't think you have more to say—you might repeat earlier reflections that seem most salient, you may have a few minutes of silence, or you may find you have more to say than you expected! Just be present in the conversation and see what emerges. Your listening partner can "mm hmmm" and nod affirmatively, but this is not a standard back and forth conversation. They simply ask and listen actively. They'll get their turn next!

Here's how the process goes. The same question is asked repeatedly—five times.

Begin your five-minute timer.

Partner A asks: "Why are YOU involved in our family philanthropy?"

Partner B answers.

Partner A asks (again): "Why are YOU involved in our family philanthropy?"

Partner B answers.

Partner A asks (again): "Why are YOU involved in our family philanthropy?"

Partner B answers.

Partner A asks (again): "Why are YOU involved in our family philanthropy?"

Partner B answers.

Partner A asks (again): "Why are YOU involved in our family philanthropy?"

When timer goes off after five minutes, thank your partner and switch.

Debrief as a group. Possible questions:

-How was that? How was it to reflect repeatedly? How was it to just talk and answer without the expectation of conversation? How was it to be in listener-only mode?

-Observations or themes that emerged?

Next, we'll explore our collective big why—that is, the answers to the question:

Why are we engaged in family philanthropy? Why do we give, and why do we do so *together*?

Put this question up on a white board, or in the chat if you're online, and give everyone a few minutes to jot down on their own paper as many answers as they can.

Then, share your collective responses on a big brainstorm list. Give everyone a chance to identify which of the responses on the brainstorm list feel like the one to three most important drivers, and flag these with asterisks. Discuss these most important ones together to help you best understand your big why.

Take a picture of this collective list and save in your meeting notes for easy future reference.

Legacy Module 6.
Family Matters

Purpose:
To discuss what the “family” in family philanthropy means to us—past, present, and future

Outcomes:

- A chance to talk openly about what it means to give as a family
- Clarity on how this has or has not evolved over time
- Discussion about our shared intentions for the future vis-à-vis the “family” in our philanthropy

Process:
Individual journaling/drawing, followed by group sharing and discussion

Materials:
Family matters worksheet, pens, pencils (and markers if you’re an artsy group)

Why is this discussion important?

Ashley Blanchard, a family foundation trustee, ruminates on the balance she sees as essential for a healthy family giving endeavor:

“We think a lot about what’s the benefit of having us [family] involved in this? What do we bring to this? Is our involvement worth it? How do we justify a public trust for the purposes of family unification? Can we justify it? I think we feel confident that the scales are balanced, that we are doing really important work in the world, but we think about what would happen if we got off balance.”

Activity and Discussion:
Provide each participant with a worksheet (a version can be found on the next page).

Begin with individual reflection and time to write using the worksheet below as a guide. Or you may choose to provide the worksheet in advance and ask people to spend some time reflecting and writing prior to discussing together—you know your family best and which process will work best for your unique group!

Questions to reflect upon:

1. What did family mean to our giving early in our history, whether that's 5 or 50 years ago?
2. What does the family in family philanthropy mean to me—and us—now?
3. How does giving as a family make our giving—and our family—stronger?
4. What are the downsides and possible pitfalls we want to avoid?
5. What are our hopes about what the family in our philanthropy will mean in the future?
6. How can we best set ourselves up—whether through our giving focus or our grantmaking process or involving family (and/or non-family members)—to help bring this future vision into reality?

After each individual has had time to reflect and write, talk through each question. Be sure to manage time carefully so you have time to discuss each question. For some families, part of their vision for family philanthropy includes the critical addition of outside voices, whether trusted family friends or advisors, or community or topical experts—so be willing to open yourselves to this possibility!

Family Matters Worksheet

1. **What did family mean to our giving early in our history, whether that's 5 or 50 years ago?**

2. **What does the family in family philanthropy mean to me—and us—now?**

3. **How does giving as a family make our giving—and our family—stronger?**

4. **What are the downsides and possible pitfalls we want to avoid?**

5. **What are our hopes about what the family in our philanthropy will mean in the future?**

6. **How can we best set ourselves up—whether through our giving focus or our grantmaking process or involving family (and/or non-family members)—to help bring this future vision into reality?**

Legacy Module 7.
Talking ’Bout My Generation

Taking time to talk in generation-specific groups can be a rare and revelatory experience.

Purpose:
To understand the defining events of each generation and their philanthropic ripples

Outcomes:

- Individual reflection on what events and dynamics define your generation
- Increased understanding of these differing generational forces and identities
- Discussion of how these differences inform how we think about social change and philanthropy

Process:
Fishbowl structure, group discussion

Materials:
None

This piece builds upon an activity developed by 21/64 called Generational Personalities © 2015 21/64, Inc. 21/64, Inc. is a nonprofit practice providing multigenerational advising, facilitation and training for next generation engagement.

Activity and Discussion:
Begin by identifying what generations you have represented in your family. A common breakdown can be found below:

- The Greatest Generation – born 1901-1924
- The Silent Generation – born 1925-1945
- The Baby Boomer Generation – born 1946-1964
- Generation X – born 1965-1979
- Millennials – born 1980-1994
- Generation Z – born 1995-2012
- Gen Alpha – born 2013 – 2025

Divide the amount of time you have for this discussion by the number of generations you have represented. If a no-longer involved or alive family member of an older generation is still a strong presence in the room, or if you are soon to include new, younger generations, you might even hold a bit of time to consider them too.

Each generation will have the chance to be the focal point of questions and reflection. The rest of the group will ask them a series of questions:

- What have been the three to five defining historical events or forces in the broader country or world since your birth?
- How have these events defined your generation—and you?
- What do you see as prevalent stereotypes about your generation? What elements of these stereotypes ring true for you and your own experience?
- What do you feel is important for your family to know about how your generation impacts who you are and how you see the world—particularly with respect to social change and philanthropy?

After each generation has had a chance to share, debrief and discuss together. Some questions you might explore:

- What did you find most interesting about that exercise?
- What surprised you? What did you learn?
- How does having multiple generations at the table strengthen your giving? How does it sometimes make it more challenging?
- How can we intentionally capitalize on this breadth of generational perspectives to make our giving more enjoyable and more effective?

*Sometimes offering examples can be helpful to get folks thinking. Here are a few:

- The Vietnam (or any other) War
- 9/11
- The elections of President Obama and President Trump
- The Great Depression
- Slavery, The Holocaust, Internment Camps
- Hurricane Katrina
- Sandy Hook shooting
- Legalization of same-sex marriage
- Immigration waves
- Suburban sprawl
- Introduction of new technology—private home phones, computers, cell phones, the internet

Legacy Module 8.
Founder Interview

Simple approach to interviewing and documenting your donor's story and hopes for the future

Purpose:
To hear directly from the founder(s)

Outcomes:
- Opportunity for the founders to share about their philanthropic journey
- Chance for other family members to ask questions, listen, and learn
- Formal or informal documentation of founder story and hopes for the future

Process:
Fishbowl structure, group discussion

Materials:
Questions list, two mechanisms for recording (phone and video, or two phones for back-up)

> Recommendation: Meet in a comfortable living room space, not around a table.

Many families wish they had video or audio of their founders available to center their giving, to hearken back to, to share with future generations, etc. You can hire a documentary writer or filmmaker, certainly and some giving families have done so with great outcomes. But you can start much simpler, by having a family conversation and recording it.

Activity and Discussion:
Set aside time to interview the donors or founders of your family giving enterprise. In advance of your interview session, determine who and how you'll record the discussion (audio and/or video) and be sure to have a second mechanism as back-up.

In advance of recording, create a list of interview questions. You can create your own, more personalized list, or build from the list below. Decide how you'll ask the questions—whether one person will serve as interviewer, or whether you'll take turns asking questions. We recommend the latter to engage everyone in the process.

Be sure to share this list with your interviewees in advance; some people need time to reflect and others are fine off-the-cuff, but give them the opportunity to prepare if they wish. And, approach the interview with empathy—this can be a daunting prospect for many donors, even just in discussion with their loving family.

<u>Founder Questions – A Starting Point*</u>

- What are some of your earliest memories of giving, helping, or volunteering?
- What have been meaningful gifts you've received in your life, material or metaphorical?
- Why did you begin this foundation (or donor-advised fund, etc.)?
- What are your hopes for what giving as a family will accomplish for the world? For our family?
- What worries you about our family philanthropy?
- Are there specific organizations or general areas, topical or geographic, you want us to give to always? Approaches you want us to take? Or do you feel flexible?
- What are your hopes for the future of our family giving?
- What are some of the values that have guided and sustained you through life? Where did these values come from?
- What family stories or role models have instilled your values and worldview? What opportunities in your life were most crucial to your own success?
- What is an accomplishment you are deeply proud of in your career? In your roles and relationships within your family?
- What's been one of the most meaningful gifts you've ever received, whether advice or something material, and why?
- What's a grant or philanthropic gift you've made—or other philanthropic involvement—that you are particularly proud of or connected to, and why?
- What have you learned along the way as a donor? Any fumbles or foibles you'd like to share?
- What aspects of how you give have been meaningful to you, whether multi-year giving, named (or anonymous) gifts, building deep relationships with grantees, etc.?
- What's a change in the family giving that has already occurred that you would note as being healthy growth and development of your giving?

- Is your hope and intent that the foundation hews closely to your current vision and foci and giving approach, or that successive generations lead and give as they see fit given ever-shifting community needs and board passions?
  - ◊ Are there key grantees or geographic areas you'd like to ensure will always remain a part of the family's giving?
- What are your greatest hopes for the future of our family giving, whether around what we give to, how we give or work together, or if/how future generations are involved?
  - ◊ Can you imagine non-family members being involved?
- (If using a family foundation as vehicle) Why did you establish the foundation as a family philanthropy? Why not as an individual giving program—one where you wrote checks directly to nonprofits? Why not as a general bequest to your favorite organization(s)?
  - ◊ What does the "family" in family philanthropy mean to you?

After the interview, thank the donors for their candor and thoughtfulness, and be sure to save the documentation in multiple places and share it with the family.

Legacy Module 9.
Stewardship and Governance

Purpose:
To gain insight into how younger and succeeding generations will be best prepared and equipped to support the family philanthropic work.

Outcomes:

- Time for current and future leaders to reflect and listen
- Articulation of wants, needs, and priorities in this process
- Ideas for next steps

Process:
Generational conversations, full group discussion

Materials:
Questions list, two mechanisms for recording (phone and video, or two phones for back-up)

> Recommendation: Meet in a comfortable living room space, not around a table.

This module builds on module #2; it is an opportunity for open dialogue within and across generations about what is needed for trusting, meaningful passing of the leadership baton.

An openness to change is a critical component to healthy transition. For some younger generations, simply administering the giving in a different manner can make all the difference in it being an accessible enterprise, whether that means staff or utilizing a donor-advised fund.

Activity and Discussion:
Note: This activity builds on a model from Liberating Structures called What I Need From You.

The first portion of this session takes place separated by generations. Many families find this is the first time they've done so in a philanthropic context.

Each generational group should explore and take their own notes on the following questions:

- What do you need to feel comfortable transitioning leadership to the next generation/to you?
- From what surfaces in this first question, what are your true needs, and what are your wants?
- What feels like the most important priority items to allow for this transition?
- What do you envision as an ideal timeline for this transition to take place—it could be in the next 12 months, or 10 years from now.

Each generation should nominate a spokesperson.

Bring the groups back together and share openly your answers to these questions. Note where there is easy agreement, and where there are a range of perspectives. Discuss—or plan to discuss—those places of divergence. This is unlikely a one-time conversation, but a beginning.

Legacy Module 10. The Question of Lifespan

Purpose:
To discuss lifespan of your giving—whether 10 years or perpetuity.

Outcomes:

- Articulate assumptions
- Explore alternative paths
- Discuss implications—pros and cons—of both

Process:
Individual or paired reflection, group discussion

Materials:
Lifespan Implications Worksheet (see next page), pens/pencils

Whether a specific family giving enterprise is set up for perpetuity or for a specific lifespan of 10 or 50 years can have a tremendous impact on all aspects of how you do your work. To be clear: we are talking about what is the time frame in which you intend to give away your philanthropic assets? But lifespan tends to be an elephant in the room question—important and weighty, but all too often avoided. And sometimes when assumptions are further explored, different choices are revealed.

Activity and Discussion:
Depending on the size of your group and appetite for pre-work, either complete the attached Lifespan Implications Worksheet ahead of time or at the beginning of your session. You may do so individually or in partners; you choose the best path for your unique family group.

The worksheet invites you to explore two lifespans or time horizons for your family giving enterprise:

- The first is your current stated (or presumed/best guess, if not explicitly stated) time horizon.
- The second is a different time horizon you'd find it compelling to consider or discuss. For instance, what would it look like to spend down all your assets in the next 10-20 years?

For each time horizon, you'll answer the following questions:

- What are the benefits of this time horizon, for our family and for the world?
- What are the downsides, for our family and for the world?
- What other implications are there of this lifespan?

After everyone has completed the worksheets, discuss together as a group and determine if there is a shared understanding of your time horizon, how to move towards one if not, and if you want to consider a change. This, like many of the discussion modules, is well worth revisiting!

Lifespan Implications Worksheet

CURRENT TIME HORIZON:_____________ YEARS

What are the benefits of this time horizon for the world?	What are the benefits of this time horizon for our family?

What are the downsides of this time horizon for the world?	What are the downsides of this time horizon for our family?

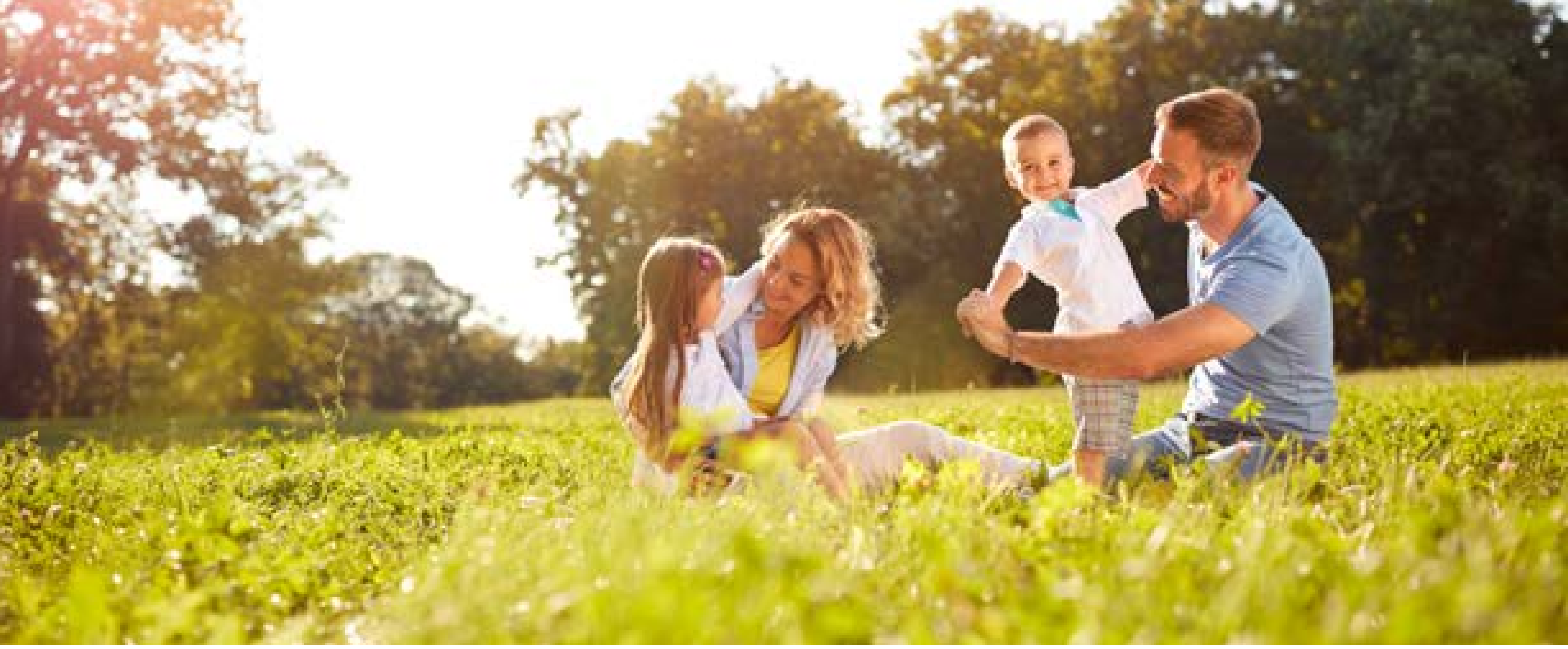
What other implications are there of this lifespan?

DIFFERENT **TIME HORIZON:_____________ YEARS**

What are the benefits of this time horizon for the world?	What are the benefits of this time horizon for our family?

What are the downsides of this time horizon for the world?	What are the downsides of this time horizon for our family?

What other implications are there of this lifespan?



Credits

About the National Center for Family Philanthropy
Established in 1997, the National Center for Family Philanthropy (NCFP) is a catalyst for the greater good; it provides donors and their families with comprehensive resources, expertise, compassionate support, and community. We are rooted in the belief that family participation enriches philanthropy and that philanthropy strengthens families. We empower donors and their families to define and pursue their purpose, establish thoughtful policies and practices, and build community to make a positive impact through their giving. NCFP is a national network of donors and their families, community foundations, and philanthropy-serving organizations. For additional information about joining NCFP's network of funders and partners, please email ncfp@ncfp.org or visit ncfp.org/join.

About Fidelity Charitable
Fidelity Charitable is an independent public charity that has helped donors support more than 328,000 nonprofit organizations with more than $51 billion in grants. Established in 1991, Fidelity Charitable launched the first national donor-advised fund program. The mission of the organization is to grow the American tradition of philanthropy by providing programs that make charitable giving accessible, simple, and effective.

About the Author

Janice Simsohn Shaw is an adept, high-energy facilitator with nearly 25 years of experience helping philanthropic and social change leaders to be better partners, listeners, and givers. She is a passionate and vocal advocate for the power of communal learning and action, proudly serving a diverse range of inspiring groups in helping move their work forward in meaningful ways.

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