



Family Giving Lifecycle Toolkit

Introduction



NATIONAL CENTER FOR
FAMILY PHILANTHROPY



Overview



Family philanthropy has many points of inflection—moments to embrace proven practices and advance momentum or to stall out due to uncertainty and lack of clarity. Rooted in intentional philanthropy, the Family Giving Lifecycle framework names these critical points and orients donors toward effective outcomes.

The National Center for Family Philanthropy (NCFP) published the Family Giving Lifecycle Toolkit in 2022 to help families make essential decisions in their philanthropic journeys. The toolkit is copyrighted but free to download and use.

The toolkit contains seven primers. Each primer contains:

- **Fundamental information** about a topic, guidance on creating a plan of action, and additional insights to increase effectiveness
- **Worksheets** to help you clarify and focus your philanthropy
- **Tips for making decisions**, effective implementation, and involving your family in discussing the topics
- **Links to a few essential resources** to further explore the topic

The online page for each primer contains the essential resources listed in the primer and additional templates, tools, and webinar recordings.

Example Uses of the Primers

The primers and worksheets are meant to be useful to donors and families at all stages of their philanthropic journey. Common situations where these guides are likely to be most useful include:

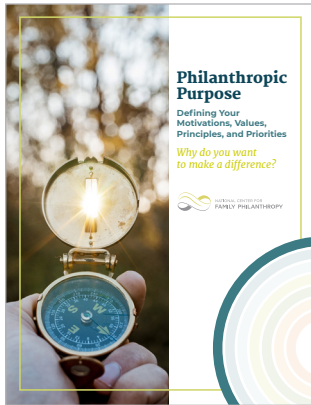
- Advising a couple who recently created a donor-advised fund or foundation and wishes to begin organizing and focusing their giving
- Guiding a donor who wants to develop an impact strategy that goes beyond grants to charities to include such practices as advocacy, impact investing, or building collaboratives
- Providing materials to financial advisor or attorney who needs materials to share with clients and discuss at a future family meeting
- Offering staff of a family office or foundation a concise resource resource to help a family re-energize their philanthropy or resolve an internal challenge slowing their progress
- Advising a family with generations of experience in philanthropy who wants to step back and re-evaluate the purpose, policies, and practices they've created.
- Assisting a philanthropy-serving organization or philanthropy advisor looking for content for an interactive workshop.

Have Questions? Need More Help?

Contact NCFP at ncfp@ncfp.org to learn more about using this toolkit and complementary programmatic offerings.



Outline of the Family Giving Lifecycle



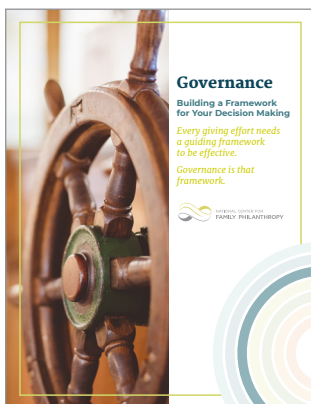
1. Philanthropic Purpose

- Nine philanthropic motivations
- Values and/or principles
- Priorities (populations, places, and issues)
- Giving style
- Purpose, mission, and vision statement



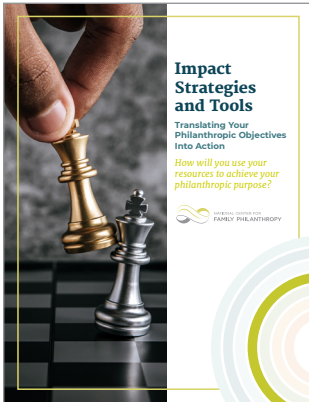
2. Impact Vehicles and Structures

- Form follows function
- Six questions to choose a vehicle
- Resources (time, talent, ties, testimony, treasure)
- Four types of vehicles
 - Charitable vehicles
 - Market-based vehicles
 - Public policy vehicles
 - Peer-based vehicles
- Combining vehicles



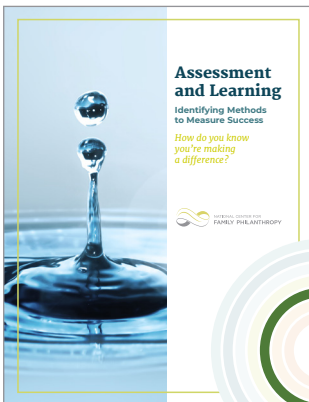
3. Governance

- Governance framework
 - People
 - Principles
 - Policies
 - Practices
- Time horizon (lifespan)
- Purpose-driven governance
- Expanding viewpoints
- Sharing power
- Transparency
- Family culture and resiliency
- Private foundation boards
- Making good decisions



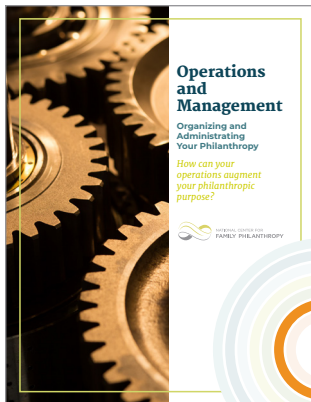
4. Impact Strategies and Tools

- Philanthropic strategy
 - Goals and aspirations
 - Context and four strategic approaches
 - Your role
 - Process
 - Self-improvement
- Being a good partner
- Developing a grantmaking process
- Social impact toolkit
 - Impact tools
 - Influence and system change tools
 - Leverage tools
 - Learning tools



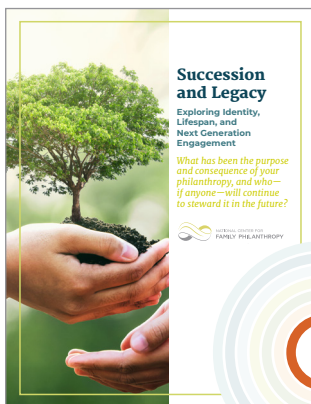
5. Assessment and Learning

- Assessment plan
 - Three performance areas (internal, strategy, partners)
 - Principles
 - People
 - Four goals (inform strategy, monitor results, understand impact, facilitate improvements)
 - Evaluation methods
- Learning culture
- Evaluating partners and impact
- Performance measures matrix
- Learning agenda
- Internal evaluation and renewal



6. Operations and Management

- Form follows function
- Types of operational functions and tasks
- Governance stages which inform operations
- Organizational culture
- Purpose-driven operations
- Staffing structures
- Staff, advisors, and consultants
- Setting up an office
- Internal and external communications
- Hiring family



7. Legacy and Succession

- Philanthropic continuity plan
 - Five levers of legacy
 - Three choices of lifespan
 - Transition preparation
 - Dissolution preparation
- Donor intent statements and legacy recordings
- Preparing successors and yourself for transitions
- Next generation

About the National Center for Family Philanthropy

NCFP is a network of philanthropic families committed to a world that is vibrant, equitable, and resilient. We share proven practices, work through common challenges, and learn together to strengthen our ability to effect meaningful change. Our range of programs and services support family philanthropy at its many points of inflection and help families embrace proven practices and advance momentum. Explore our resources, all rooted in a [Family Giving Lifecycle](https://www.ncfp.org) by visiting www.ncfp.org.