

Evolving your Family Philanthropy: Family Engagement and Legacy

A Fundamentals of Family Philanthropy webinar recorded on July 8, 2025.



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FAMILY PHILANTHROPY

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Featuring:



Toya Graham
Carolyn W. and Charles T.
Beaird Foundation



Cameron Griffith
Surdna Foundation



Lindsay Hall
Laird Norton Family
Foundation



Lisa Parker
Lawrence Welk Family
Foundation

Transcript of the *Fundamentals of Family Philanthropy* Webinar, Evolving your Family Philanthropy: Family Engagement and Legacy, Recorded on July 8, 2025

Britt Benavidez

Welcome everyone. My name is Britt Benavidez. I'm the senior manager of programs at NCFP, use she/her pronouns and I'm a white and Latina woman with medium brown hair, brown glasses, and I'm wearing a black top today. Thank you for joining us for our monthly Fundamentals of Family Philanthropy Webinar. This series provides guidance on the core tenets of effective family philanthropy from motivations and values to governance, grant making, and succession. The series is designed to equip giving families with the latest information on evergreen topics in the donor lifecycle through practical takeaways and diverse family stories that illustrate important practices.

Before we begin, let me briefly share about our webinar technology. We're using Zoom's webinar platform and your controls are located along the bottom of your screen. Closed captioning is enabled and you can turn captions on and off by clicking the CC icon. We want this webinar to be interactive, so please submit questions for the panelists as they come to you. To ask a question, please use the question box with the Q&A icon at the bottom of your screen and when sending in a question, if you wish to remain anonymous, please indicate that by checking the box to submit anonymously.

As a reminder, this webinar is being recorded and a replay will be made available to all attendees. If you experience any technical issues, please try reconnecting to the Zoom link or email me for assistance. I'll put my Zoom in the chat in just a moment. As always, you're welcome to chat with us on Twitter about today's webinar using the hashtag #ncfpweb.

So today's program is Evolving your Family Philanthropy, Family Engagement and Legacy, and we'll explore how to navigate conflict, engage young family members and build lasting legacies. Whether you're newer to philanthropy or seasoned or a family member or a staff member, we hope you'll leave today's webinar with insights you can apply to your work.

Our goals are that you'll hear how family members are being engaged in their philanthropy in formal and informal ways, even as they're geographically dispersed and leading busy lives. Learn practical ways to engage family members, especially younger ones, and navigate conflict. And understand how to create and sustain a legacy within your family's philanthropy.

So before we get started, I would love to do a poll here if you could please answer these questions. What's your role with your family philanthropy? Does your organization have a family engagement program? And what do you hope to learn during today's discussion? So this will help us tailor some of our panel. Thank you so much. I'll leave the poll open here for a few more seconds. A few more seconds on that poll.

All right, I'll leave it open for a few more seconds, but I'm thrilled to now introduce our panelists to you. Joining us are Toya Graham, executive director of the Carolyn W. and Charles T. Beaird Family Foundation. Cameron Griffith, board member of Surdna Foundation. Lindsay Hall, board chair of the Laird Norton Family Foundation. And Lisa Parker, president and executive director of the Lawrence Welk Family Foundation. Thank you all for being here. And Toya, over to you.

Toya Graham

Good day everyone. I am Toya Graham and I use pronouns she and her. I'm a Black woman with short black hair and today I'm wearing a white blouse. I'm excited to moderate today's panel and set us off to an informed start. First, a bit about the Beaird Family Foundation. I serve as executive director a role in which I have served since 2014. I'm the only foundation staff member for the foundation, but co-located in the Beaird family office with three employees responsible for the family's business ventures. The foundation is place-based located in Shreveport, Louisiana, and annually we grant approximately \$1.7 million. 85% of our grant-making stays in the northwest region of Louisiana, so that Shreveport City region.

The foundation was founded in 1960 as a corporate foundation and became a standalone family foundation in 2009. Four generations have been involved in the foundation. The first generation, Charles and Carolyn Beaird passed in 2006, and currently over 50 family members make up the second, third, and fourth generations of the foundation. Majority of the family reside outside of Louisiana, therefore family engagement and legacy are important aspects of the foundation's philanthropic mission. An example of how we intentionally center legacy and engagement is the family meeting being hosted in Shreveport.

The family meets annually and every third year they rotate to Shreveport, Louisiana where family members participate in nonprofit engagement activities in the community, so getting out of the building. These activities, we identify activities based on nonprofits that Carolyn and Charles, the first generation, would have supported and been involved with. The family is reminded through this visit every third year to Shreveport that the foundation's legacy, as well as impact in Shreveport is important and all while having a chance to engage with family and community.

Even so like many of our peers, we recognize the need for continuous learning and improvement, especially with our niche gen engagement and we define our niche gen as those fourth generation members under the age of 18. Upon your 18th birthday, you are invited into the adult membership of our foundation where you can serve on committees, and after a year of service as a member, you can also seek nomination to our board of trustees.

NCFP's Trends reports have been timely resources for us at the Beaird Foundation to tap into other family foundations experiences in engaging family members. The 2025 Trend Report highlights the importance of understanding niche gen, family member participation barriers, and also identifying differences in generational values. A few notes from that 2025 report.

The report indicates that 86% of responding family foundations encourage their niche gen to participate but still face participation barriers. The most common factors impeding participation have been noted in the Trends report as life and other commitments, being in different life stages, career, education, or otherwise are barriers to members participating. Geographic dispersion. You just heard about the Beaird Family Foundation, the majority of our family members live outside of Louisiana, so that can affect participation. And finally, the Trends report also identifies dysfunctional family dynamics as responses from family foundations noting barriers to family member participation.

Added to these participation barriers are dramatic generational shifts that affect how families are giving collectively today. The Trends 2025 report notes that generational differences in values as well as political, social, and religious views affect family member engagement and participation. There are many bright spots in the report as well and we'll get to some of those that we've experienced within our foundations in just a minute. One notable bright spot in the report is that family foundations that spend more time engaging their niche gen, report more effectiveness in their work. So tapping into ways to connect with niche gen show tremendous benefit from those responding in the Trends report.

I'm excited that we have panelists who continue to strategize and learn new ways and then keep some of those proven ways that have worked well for them in affecting family engagement and legacy

awareness. So let's launch into the panel by having panelists introduce themselves, their organization, and briefly describe their niche gen and generational involvement. We'll start with Cameron, followed by Lindsay, and close with Lisa with the introductions. Off to you, Cameron.

Cameron Griffith

Thanks, Toya. So I'm Cameron Griffith. I am a white man, probably the only person on this screen who's wearing a tie, so I use he/him pronouns and I'm a board member of the Surdna Foundation, which is based in New York and was established in 1917 by our founder Patriarch John E. Andrus. Again, I'm a fit generation family member. So John Andrus was my great-great-grandfather. And I have been on the Surdna board for about eight years now. I'm one of nine family members on the board. We also have four non-family or community board members. Surdna, it has a social justice mission. That's something that if you check out our website, surdna.org, which some of you may know Surdna is Andrus spelled backwards, but it goes into our mission, vision, values, and talks quite a bit about the foundation's work.

In terms of next generation, we have something called the Andrus Family Philanthropy Program. I'm actually currently the chair of that. My cousin Kelly Nolan, who I think is part of the audience today was on the Surdna board before me and she headed that committee of the board. And before that her aunt, Edith Thorpe, established the... It was called the Family Involvement Committee in 2000. And the big thing that came out of the Family Involvement Committee was the Interest Family Fund, which was created to give younger family members like myself, again, this is going back to 2000, the opportunity to learn about Surdna, about philanthropy, and I was one along with Kelly and some of my... We call each other cousins, but I was one of the original board members of the Interest Family Fund, which is still in existence today.

The AFF program, which again encompasses Interest Family Fund also has next generation engagement of high schoolers, basically age 14 through 17. It's called the Andrus Youth Service Program. Currently, it's an online program and actually when we talk about family engagement, distinguishing between online and in person is something that I think really affects participation. There's also the Board Experiential Training Program or BETs we call them. BETs is for slightly older family members, I think between the ages of 17 and 22. Actually, the Interest Family Fund is 25 to 45 years old.

And then we have a BETs 2 program, which is intergenerational, which is actually one of really the things I like about it, to engage not only the younger generation, but in our most recent cohort of BETs 2, we had my uncle who is a fourth generation Andrus family member participate with some of the younger sixth generation family members. That's also open to staff of Surdna. So that's an innovation we've had recently and we've actually had family members of Surdna staff participate in the BETs program, which gives a really nice way of broadening the perspectives that basically learning about board service and social justice.

I might stop there, maybe I didn't say that Surdna has 27 staff members and I believe the endowment is currently about \$1.2 billion. Anyway, that's a little bit about Surdna and our next generation.

Lindsay Hall

Okay, great. Hi everyone. Am I supposed to just go? Okay. My name is Lindsay Hall. I am a short white woman with light brown hair, dangly, white earrings, and a red sweater. I have a large with lots of teeth, which I hope results in a warm smile. I'm the chair of the Laird Norton Family Foundation, otherwise known as LNFF. Laird Norton is an eighth generation family. We have 550 living family members worldwide. Laird Norton was founded in 1855 and we are still a privately owned and operated family business. Our foundation though specifically was through different iterations, but it started in 1940.

I think what's important is when I talk about Laird Norton, I'm referring to both our family, our business, and our corporation. I mean our foundation, sorry, and our foundation. It's impossible to talk about one without the other, they all sort of support and uplift each other through collaboration. They share the same constituency, so we're all working for the family. But LNFF has a corpus of about \$42 million and we give about 1.8 million a year through grants. We have two staff and a board of eight directors and two associate directors. I think one of the unique things, we are a governance board, meaning there are four funding advisory committees, or we call them FACs. They have different focuses and they bring... There's a very high level of family engagement because there's lots. Each FAC has about eight to 12 family members.

There are different focuses, so there's arts and education, which I was involved with for a long time before I joined the board. We have climate change, human services, and watershed. And then we have the Sapling Fund, which is probably the most of interest to this group, which is our younger family members ages 14 to 20, and it's to introduce them to philanthropy. Also, we have our next gen, which is a company program, and it defines next gen as between the ages of 21 and 40. And it spans about two generations, so. Lisa?

Lisa Parker

Great. So I'm Lisa Parker, president of the Lawrence Welk Family Foundation. I am a white woman with brown hair atop my head in a bun, and I'm wearing a leopard print sweater. I go by she/her. I am third generation of our foundation, which was founded by my granddad, Lawrence Welk in 1960. My mother took over the management of the foundation in 1980 and I took over in 1997. So we have now four generations, we're in the fourth generation. Three are involved in the foundation. As I said, I'm third generation, there are 10 of us, and in our fourth generation there are 20. And when defining next gen, you'll hear me speaking about the next gen at a very young age. So we engage starting at the age of four, and that is for the fourth generation. My generation was engaged early on as a junior board, I was 13. Do you want me to answer now about the way we engage our family or save that for the next question?

Toya Graham

Why don't I set the question up so that the audience will also follow along how we're framing up the beginning of the conversation? Thank you all for your introductions, and as you all can see, there's variety in the makeup of our organization. Some of us have been around much longer than others. I think the commonality is that we all are seeking ways to further engage the family in meaningful ways to truly build impact. And so we have questions that we'll present and each panelist will share some insights on their experience based on the themes for each question.

So we will start with Lisa for this first question regarding younger generations. Great segue, Lisa. Lisa, we'd love to hear from you regarding how you foster a sense of belonging and connectivity, especially with younger generations, and infuse their perspectives. So that perspectives piece being really important.

Lisa Parker

Yeah. Thank you, yes. So as I mentioned, my generation was engaged early on as a junior board. And what that meant was that we attended the full board meeting, the regular board. And I think one of the key things about that was we were encouraged to fully participate. I don't think we even realized that we didn't have a vote, but when it came to discussing the organizations and our opinions of the programs, it really felt like it was helpful. We fund in three neighborhoods in Southern California around

youth and families living in poverty. We had opinions about some of the programs from a youth perspective. We don't think it's going to work to just say no to drugs, we have other opinions about that that they found very helpful.

So we had this embrace of us in the full board meeting and then we had 10% of the gifting budget that we were able to give as we pleased in ways that were relevant to our generation. Our founders could never have envisioned the issues that were present day at the time, the beginnings of the AIDS epidemic, a much deeper understanding of the environmental crises faced in our oceans and our air and otherwise. So we were able to make grants in those areas and others that were relevant to our family or to our generation. And the really cool thing about it was it was fun. We felt validated being a part of the full board meeting and we felt agency being able to make grants on our own.

But this was largely taking place in a corporate office boardroom, and so when I came to leadership in 1997, we were just starting to welcome our next generation being the fourth generation. And I realized this wasn't going to work for them, especially because we wanted to start nurturing the conversations around giving and philanthropy much earlier on than my generation. And so I got real curious how you do that in age-appropriate ways, whether you're working with a 4-year-old, a 14-year-old, 24-year-old, and suddenly there were 20 in the fourth generation to be Guinea pigs.

And so we started an annual gathering that we call Cuz-apalooza and there's about 40 family members, usually about 30 show up every year. And we did that intentionally so that there would be bonding time, getting to know each our cousins, our cousins' kids, but also that there was a philanthropic side to our gathering. And so we would take a day to either do a fundraising project, a site visit, volunteer project. We did that to show the next generation from a very young age that giving, philanthropy was multi-faceted, it wasn't just giving away money, it was service and bringing our own sense of generosity to causes that we cared about, not just our financial contribution.

We also did it to expose them to a number of different issues with the understanding that you don't really know what you care about until what the issues are. And so that was fascinating to learn about how that giving instinct and the causes that engage people in developmentally appropriate ways very young. It's so fascinating. I could geek out on some of that research, but almost universally, one of the first causes that a young person has is animals. And so we did a visit to the wild animal park to learn about their preservation efforts. That's just one example of a Cuz-apalooza activity. And I can speak to more of that later in the call or at a different time, but we really engaged in things that were relevant to the age of the kids that we were working with.

Toya Graham

And Lisa, what I'm really hearing too is you made it fun. I love the name. The immersive experience that your niche gen are able to have when they gather once a year. I believe Lindsey has some insights as well for their meetings that they have each year. You're on mute, Lindsey. Thanks, Lisa.

Lindsay Hall

Just wanted to show that smile. I would say that we're always looking to identify the glue that's holding us together, those points of connection and cohesion. And I would say that most of our engagement and connection are in two ways, I would say. And one of them is our family summit, and then the other one is our foundation. So to go into our family summit, since 1952 the company has been reimbursing family members to attend the family meeting or the annual summit or all these names, but nothing is as cool as Cuz-apalooza, I'm sorry. It was interesting because I think when your family gets a little bigger, it's interesting because everyone becomes a cousin. It doesn't matter really how you're related, it's all cousins.

So our annual meeting is a three to four-day event. Usually 300 family members are there, sometimes more if we're going to a really cool place, there's more people. We literally take over whole hotels. It's just a lot of fun. We have lots of activities that promote cousin connectivity like a family Olympics or a theme dinner. And then also during that time we have our shareholders meeting, which is the business puts that on. And then there's also a members meeting which is put on by our family council and they report on family programs. And so the foundation gives our presentation an update then. The family summit is also a great time for our FACs or our funding advisory committees to do their recruiting. And it's also the place where our Sapling Fund, that's the youth philanthropy, does their grant making.

And since everyone comes to the annual summit or a lot of people come to the annual summit, somebody has to take care of the kids. And so when that started happening more and more and there was more and more kids, they created a children's program that's called Camp Three Tree. And this is literally just a super fun cousin summer camp and it's run by the same company. They're called Family Biz Kids. It's the same group of counselors year after year. They truly grow up together, which is from infancy. They're coming to this when they're just little babies and they go to it until they're 14. The story is that even when the parents are like, "I don't think we want to go to the annual summit this year," the kids are like, "No, we're going because we're going to Camp Three Tree and I'm sorry."

And then I would say our foundation, when we created this iteration of our foundation is really based on a model of family engagement. So that's why we have those different FACs with the different focuses to... We have about 68 family members that are currently involved with that. There's just a lot of different ways for people to get involved, things that they're passionate about, that they're interested in, and so that there's this meaningful engagement. And the FACs meet probably one or two times in person a year where they do their granting and site visits and then two or four times virtually in a year.

And then our Sapling Fund, which I mentioned before, it really provides our younger members a voice. And it's for 14 to 20-year-olds. There are currently 45 members of our family that are in that range. This last summit we just had, there was 27 of them came to the summit and participated in the Sapling Fund activities that were going on there. But I would say there's maybe 12 full year-round engaged members to that. They have a \$50,000 budget and their typical grant size about 3 to \$12,000. Sapling is just, it's amazing. It helps them build leaderships and life skills. They learn about grant making and the nonprofit world, they build their resumes for college or job.

And one of the things that I really like about Sapling Fund too is that their focus is always evolving. Because of that age restriction, they have a constant rotating group of kids, so they're guided by a for youth by youth philosophy, but they redefine that focus every year based on the interests of those involved, which I think is really key to engage them and to give them autonomy is also important. They have to run it, they have to have control. But I would say that both the FACs and the Sapling Fund are building connections through that philanthropic giving and that I think in itself creates a deeper and more meaningful bond.

Lisa Parker

Can I just jump in on that for a second? Because I didn't mention that during our Cuz-apalooza, we also have a for youth by youth. The junior board meets and defines every year what their focus will be. So I really appreciate that. And during that Cuz-apalooza also have our regular board meeting, the regular board meeting, the junior board meeting, but I think we have a lot to learn from Laird Norton, things we can do. I'll pop off and give Cameron a chance.

Cameron Griffith

Sure. Thank you. The one thing that I will say about talking about family engagement is that our family tends to be... It's so big, there are about 500 family members that until I got involved with the Andrus Family Fund in 2000, I didn't really know branches of our family. And I would say that's one of the biggest things that I have gotten out of. I've gotten to know my family. I served for six years on the Andrus Family Fund. A number of my cousins, including myself, went onto the Surdna board and there really is a sense of knowing who these family members are. And so that's been a huge benefit of being part of the philanthropies.

The other thing that I didn't mention is that John Andrus also started an orphanage in Yonkers, New York. It's now called Andrus. It's a children's center that's got a family... The board is family members and community members. And his youngest daughter, Helen Benedict, started something called Andrus on Hudson, which is also in Yonkers. And it's retirement nursing home facility that also has a board with family members and non-family members. And so that's something that even broadens more the family engagement and the various philanthropies.

Trying to tie those organizations together, they have different missions, so it's not intuitive how that's going to happen. Some of the board members on CERDN are also part of either Andrus or AOH boards. The Andrus Family Philanthropy Program that I mentioned that I chair now, it's a committee. Or the Andrus AFPP committee also has representatives from AFF, AOH, Andrus on Hudson, Andrus, and a recent BETs participant, which tends to be a younger family member.

So one of the things that you talked about having that family reunion, we had a family reunion. We call our family reunion Concinnity. We had that two summers ago in northern Minnesota. It was not funded by the foundation. In fact, that was a little bit of an issue is that we were staying at a family-owned resort, it was expensive. Not all the family members either had the time or money to participate in that, and yet we had about 100 family members from the different branches of the family come. I helped to organize that with a couple of my cousins and we had panels on what the various philanthropies are doing.

And one of the most rewarding things about that was even the preparation where I find that this one-on-one personal outreach to people is really the most effective way of engaging family members. It's time-consuming, it doesn't get everybody, but that's for me the most rewarding and effective way of communicating with family members.

The Surdna Foundation publishes a newsletter annually called Concinnity. This year we talked about who was John Andrus and what did he stand for. I think we'll get into some of the mission issues a little bit later, maybe on another question, but that's something that is available electronically, mailed out to family members, and is really a way of... When people get that they see their cousins, they see articles about the various philanthropies. And that's been something that I look forward to getting and I think others do.

We also have, we don't call them webinars, but we call them Andrus Family Dialogues, which are virtual sessions that started during the pandemic. It was originally called The Social Justice Series. What is social justice? How do you talk about it? How do people learn about that? And that was something that engaged not only the people that I knew or had been on one of the various boards, but some other family members that hadn't participated before. There is a sense that if you're on Surdna, you're in the know and if you're not, you don't know as much about the philanthropy.

So that was one of the ways of being able to provide a connection to family members without actually serving on a board. And I would say all of these things together is how we in the Andrus family have tried to connect the different generations and even in the same generation have people get to know each other.

Toya Graham

So important when discussing family engagement identifying those ways to connect and whether it be one-on-one, which as you mentioned, Cameron, can be time-consuming, but highly effective, or using more of a group setting through your annual meetings and really tailoring those meetings, especially for next gen programming and building ways for next gen to be autonomous sounds like some very effective key strategies that many of us have used to further engage and keep the awareness of legacy when we are engaging families.

So let's launch into legacy because each of you have spoken somewhat on this topic of legacy and bringing that into the fold of family engagement. And we'll start with Lindsay. How do you define legacy? When do you begin the journey and what are the engagement opportunities throughout the family members stages of life? We've heard a bit about next gen, so feel free to build on that or shift to another conversation related to a different generation if that works for you.

Lindsay Hall

Okay. So Laird Norton began as a lumber business and when we sold that legacy business about 20 years ago, we searched and struggled to figure out what our new legacy would be. And I think ultimately what we realized was that simply being an eight generation family is in itself our legacy. And so we make a deep investment in defining and understanding the glue, that glue that holds us together. Because I would say that that glue is the secret sauce, that is the secret sauce of how we perpetuate a legacy of longevity. And providing opportunities for engagement throughout life is a huge part of that glue. So I'm just going to go over what I already said.

So we have Camp Three Tree at our family summit. That's from infancy until the age of 14. And then at the age of 14, they're involved in the teen program and also required to attend the shareholders meeting, and they are allowed to also engage with the Sapling Fund. Then we have our next gen program, which is ages 21 to 40. We also have AD positions, associate director positions on the company board and on the foundation board, which are really learning and potential onboarding positions. And then after that, they can... Or not after that. During some of that, they can also participate in any of the FACs. So there's a range of different ways to engage and I think that is really a big part of that glue.

Toya Graham

Absolutely. Having in a sense of pipeline set up and different opportunities for onboarding, that comes across very clear. How about you, Lisa? Any thoughts regarding legacy?

Lisa Parker

Yes. Yeah. We are in an unusual position in that our founder, Lawrence Welk was a public figure at a television show and there were books about him and specials about him and that we're able to share with family. So the legacy of who our founder was. But we really have focused on during our Cuz-apaloozas making sure we talk about the philanthropic activities as an extension of who he was. I would say that these conversations should happen naturally in each of our homes, but also be celebrated when we come together. And storytelling is essential to that.

The New York Times had an incredible article several years ago on the power of young people knowing their family story and knowing about the family legacy because typically it involves challenges and triumphs and knowing you're a part of a family that has weathered challenges and triumphs makes these young people more resilient throughout their lifetime. And so it's not just a great thing to have a focus on our legacy as family foundations, but it's really an essential piece of wellbeing for our young people.

I would say that the legacy has evolved and we understand that many people that have come before us are part of that legacy. And as a part of our evolution, and I guess the big message I have is that once you have it figured out for one generation, it just evolves and changes. So it's a constant process of reevaluation. But we realized a few years ago, our grandmother Fern Welk at an incredible impact on all of us, it wasn't just Lawrence Welk. And so we are actually just about finalizing a name change to the Welk family philanthropies in order to incorporate other family members collaborating through donor-advised funds, establishing a fund in the name of our grandmother who loved medicine to focus on medical research. But these are all part of the legacy.

We even did at one of our Cuz-apalooza an exercise with the next gen, younger ones, what is your legacy and how are you connected to it? And even the very youngest one could participate and he was like six. And what he wrote about it was, "Lawrence Welk was a good man and so am I." And that was his contribution and just as meaningful to him as it was to the older ones thinking about that legacy.

Toya Graham

And what a way to foster connection, that is a question that we definitely all can connect with and attune to family engagement in that way. And Cameron-

Cameron Griffith

So if I could just quickly add, one of the things that we started in 2020 was something called The History Working Group, Who Was John Andrus? And that actually, I think Lisa, to your point, that actually came out of some controversy, at least in part where not everyone in our family thinks what Surdna is doing is a great thing. What is social justice? And so that's something that we've tried to tackle as a foundation. And one of the things we decided to do was to look into who was John Andrus and how did the social justice mission evolve at Surdna so that it was explicitly stated as social justice? That was about 15 years ago, maybe Kelly would know the exact date, but it was something when my dad was on the board was when social justice was named.

And so one of the things we did was conduct a series of oral histories with at the time current and former Surdna board members, with staff to find out how did Surdna come to name social justice as part of its mission. And we did some research into John Andrus who was also a member of the House of Representatives. I live in Washington, DC and my day job is focused on Capitol Hill. So that was something that was really interesting to me. How did he get to be a member of Congress? The mayor of Yonkers? He was one of the wealthiest men in the world when he was alive, and yet I don't think they use the term social justice in his day.

And one of the things that came out of our oral histories through some of the fourth generation members was, we didn't always call it that, but actually we feel like what we were doing all along was social justice, we just didn't name it. It was important for us to name it. And actually the Surdna board recently confirmed and reiterated its commitment to social justice in the current climate where not everyone's doing that. So that's something that I'm proud of that the Surdna board recently reaffirmed its mission. We're trying to ground it in history that's ongoing, but that's something that has been a really powerful way actually bringing family members together. And that was something that we had artifacts from John Andrus at this in-person family reunion a couple of years ago, we had told stories, some of the older family members talked about their parents and grandparents, and it really was a great way of bringing people together.

Toya Graham

Again, the theme and activation of storytelling and bringing people together with connection as well. We have a wealth of information that has been shared and we're arriving at the point in the webinar where we open to Q&A. And I see from the questions that have been shared, some of the questions are related specifically to the barrier of family participation. So I'd like to pose this question starting with Lindsay, expand on how families can adjust their practices to overcome this barrier of participation. In what ways have you all done that you haven't shared so far?

Lindsay Hall

Yeah, I think time is always a barrier. It's how you decide you want to prioritize that time. And I think creating an experience that encourages family members to prioritize the work of the foundation is key. And I think we do that by making the experience accessible. Lots of communication. Sometimes you can give more, sometimes you can't give as much. And so just creating open lines of communication around that. We also have different levels of participation. So within the FACs, you can be a chair, a co-chair. You can also be just a voting member. You can also be a friend of the FAC, which means you get all the information, but you don't necessarily vote. And then anyone who's interested can come and be a part of a retreat or a meeting. On the board, we have, you can be a director, you can also be an associate director.

And then I think also even when we're dealing with these topics that are super heavy and hard, I think we try to make our time together enjoyable. So combining grant making with cultural activities, site visits, cousin bonding time. I also think it's really important if you're trying to engage your next gen, that you recognize that there's an ebb and flow in the cadence of life and it's natural to see a lack of engagement during certain periods like finishing high school or secondary education or finding a career or building a family. I think a willingness to meet families where they are and to continually check in and simply offer those opportunities for engagement, I think those are things that are key.

Toya Graham

Absolutely. And what really rings true, everything that you said rings true to me in the statement of meeting them where they are both individually and generationally, as well as each family group that there is definitely an ebb and flow. At the Beaird Family Foundation we see that when our youth members bridge into adult membership, that they're pretty active the first couple of years, maybe they are in college and time is on their side in some way of serving on a committee. Then around 21 they dip when they are leaving college or entering a career and so on. So we experienced that ebb and flow as well.

There are several questions in the chat from the audience related to staff, time and staff who's facilitating, for instance, the next gen programming. Lindsay, you shared that you all have partnered with Family Biz Kids. Lisa and Cameron, are there any insights that you'd like to share with regard to staff facilitating or having an outside source help to facilitate some of your next gen in-person programming? Maybe starting with Lisa?

Lisa Parker

Yeah, I'm sole staff, but we have used a couple of outside consultants to facilitate some of the legacy activity I mentioned and experiential activities around giving. But other than that, it's me and we don't typically hire those. It's just every once in a while we'll hire an outside consultant.

Toya Graham

And remind us, Lisa, one quick question, how many next gen are you typically pulling together for Cuz-apalooza each year?

Lisa Parker

Yeah, it's open for the whole family, but then the youngest generation, the G4, there are 20 of them.

Toya Graham

Okay, thank you.

Cameron Griffith

We actually have a philanthropy program officer on our staff and the Surdna staff, and she, Sophy Yem, some of you may know her. She is somebody who really helps to organize us around the AYSP, the BETs 1 and 2, the Family Dialogues. Although interestingly, the virtual Family Dialogues are open only to family members, so there is not... Staff can maybe help, get the call set up, but it's just family members on those calls. And we do have outside facilitators who run the BETs programs, so.

What I will add, what we've run into a little bit is declining participation. And I don't know if that's the end of COVID and now everyone's got their life back and they don't want to do virtual, but that seemed when you're stuck in your house and there's nothing else to do, that was when we had our highest participation, and now it's declined. And that's one of the things we're really trying to figure out, why is that? What is it that we're offering that isn't as appealing to people? We don't have an answer to that.

And actually one of the things that we've been talking to NCFP about is maybe having a pilot program where the Andrus family next gen could be in programs with some of the other family foundations. So not only would you have exposure to your own branches of the family, but you would learn what some of the other foundations are doing. We haven't made any decisions, we haven't even really finalized the discussion around that, but to me that's something that seems really appealing to broaden the impact and maybe interest of people learning about philanthropy.

Toya Graham

I'll share that the Beaird Family Foundation would very much be interested in that cross-pollination, just even with the Trends report that NCFP produces, it's very helpful for us to see what the data is, what the landscape is like for other family foundations. So keep us in mind for that as well. And we have just a couple of minutes and want to present this final question to the group regarding family members being able to attend meetings because a considerable amount of our discussion has been about in-person gatherings. For family members who might not have the financial resources to attend for the travel costs and so on, what types of support, if any, do your entities provide to those family members? So if they're able to access and be able to attend in person.

Cameron Griffith

Maybe I could go on that. One of the things, and this is something that again is a work in progress, but Surdna staff often travels around the country. Surdna is a national foundation, and one of the things I've been really supportive of is if there is an occasion where there is some sort of meeting that a Surdna member, board member or staff or both would be participating, is there a way of opening up and advertising that to extended family members to invite them, for example, in the Boston area or in California and Los Angeles? Just inviting people to come to listen to our CEO or president talk about whatever the topic is. Again, it's hard to do, but that's something that I would be really supportive of.

And the other thing I'd like to mention is the alumni of not only the Surdna board, AFF. One problem that we've run into is that everyone's totally engaged when they're on the boards. And then when you go off, it's much harder to stay up to speed, what's happening. So somehow inviting maybe alumni to get together or in the context of one of these gatherings in a different city, that's a way of trying to involve people where they are that wouldn't be necessarily expensive.

Toya Graham

Thank you for that insight, Cameron. And again, meeting people where they are and hopefully moving closer to where they might be located so that they can attend some of your in-person opportunities. At the Beaird Foundation, we also, the virtual opportunities do work for us. We do have three board of trustee meetings each year as well as the family meeting each summer, but throughout the year for our committees, grants, finance, governance and so on, we do meet virtually. We host dinner and dialogues, which are usually evening sessions with family members on topics that they have shared with the foundation they want to learn more about or either shared with family members. So there's still that opportunity if you are not able to offer financial support to family members to attend in person, there are some virtual opportunities to explore.

And I want to honor everyone's time. Thank you again to our panelists today for sharing their journeys of family engagement and legacy. You can see there's a lot of variety in our makeup as well as our strategies of promoting family engagement and legacy. And I will turn it back over to our friends at NCFP.

Britt Benavidez

Thanks so much, Toya. Thank you, Lindsay, Cameron, and Lisa, we knew that we would not get to all of these questions, so I'm going to download the Q&A and there are some targeted questions for each of you. So maybe if you would be so to do written responses, we can send that along with our follow-up to everyone. A reminder that everyone will also get this recording. So we really are grateful for your time, your expertise, the guidance that you shared about your family engagement, and there was great interest from our wonderful audience as well.

So before we wrap up, we have another poll here. We would love to get your feedback on the program, how you liked it, how we could improve. And if there are any lingering questions that you didn't put in the Q&A, please add those there and we will make sure that we capture them. So I'll leave that up for the remainder of our announcements.

As you may know, and as Toya mentioned at the beginning, we released our Trends in Family Philanthropy 2025 Report. This is our third national benchmark survey of family foundations. Released every five years, the report track the leading trends in the field and includes data on asset sizes, payout rates, grant-making, family dynamics, and much more. So you can download that full report on our website and dig in there.

As we get ready to sign off, we have a few very quick announcements about our upcoming programs and we want to hear your feedback. So please make sure you're responding to that poll and your feedback is really taken into consideration for topic ideas and things that interest and resonate with you, our NCFP members. So we've taken your feedback on past programs and have used it to develop our exciting lineup for Fundamentals Series this year.

Next month, we will continue the Evolving Your Family Philanthropy series and we'll discuss different staffing structures at family philanthropies. So our full list of 2025 Fundamentals Webinars can be found on our website. We hope that you'll continue to join us the second Tuesday of every month.

And in addition to our webinars and our other programs, NCFP is pleased to offer a range of Peer Networks for those interested in connecting to family philanthropy, colleagues with similar objectives, roles, challenges, and shared experiences. You can find out more about all our Peer Networks on our website and you can always email us for more information.

Again, thank you everyone for joining us today. We had a really large group, especially during the middle of summer, so we're grateful that you all spent your time with us. A reminder that the webinar recording and related resources will be sent out shortly. And we're very grateful to Toya, Lindsay, Cameron, and Lisa for sharing their stories with us. So thank you all again and we hope to see you next month on August 12th. Take care.