

Evolving your Family Philanthropy: Staffing Structures

A *Fundamentals of Family Philanthropy* webinar recorded on August 12, 2025.



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FAMILY PHILANTHROPY

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Featuring:



Aimee Boone Cunningham
The Boone Family
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Ryan Brady
Glick Philanthropies



Megan Costigan
Tracy Family Foundation

Transcript of the *Fundamentals of Family Philanthropy* Webinar, Evolving your Family Philanthropy: Staffing Structures, Recorded on August 12, 2025

Britt Benavidez

Welcome everyone. My name is Britt Benavidez. I'm the senior manager of programs at NCFP. I use she her pronouns and for those using accessibility devices or who find it helpful, I'll provide a verbal description of myself as well. I'm a white and Latina woman with short brown hair pulled back. I'm wearing brown glasses and a black tank top today in front of a Zoom background, thank you for joining us today for our monthly Fundamentals of Family Philanthropy webinar.

The 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 life cycle 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 if you're on a laptop. Closed captioning has been 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 our panelists as they come to you throughout the conversation. To ask a question, please use the question box with the Q&A icon 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 at your Zoom link or you can email me for assistance. I'll drop my email in the chat in just a moment. As always, you're welcome to chat with us on Twitter now X about today's webinar using the hashtag NCFP web.

So today's program is Evolving your Family Philanthropy Staffing Structures, and we'll explore the many ways your philanthropy may operate, highlighting the challenges, benefits, and best practices for multiple structures. 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 that you can apply to your work and we'd love to hear from you who is in the room with us today. So if you could please complete this poll. What is your role or affiliation with family philanthropy? What is your organization's staffing structure? Feel free to check all that apply and what are you hoping to learn during today's presentation? I'll leave the poll open here for a few moments. I know you can't see the results. I'll share them in a moment, but we have a lot of staff members, some board members and advisors joining us a lot, a good mix of staffing structures here. I'll leave this open for about 10 more seconds. Thanks everyone.

Great, thank you so much. I'm going to end the poll now and I'm going to share the results out. We have a really great mix of folks here with us today, so thank you. This will help us tailor our conversation.

So now I'm thrilled to introduce our panelists to you. Joining us are Aimee Boone Cunningham, president and CEO of the Boone Family Foundation. Ryan Brady, vice President of Glick Philanthropies. Megan-Costigan, program manager of Tracy Family Foundation. Welcome to you all. Ryan, over to you. We're so happy to have you all here.

Ryan Brady

Thanks so much Britt, and thanks to the NCFP team, Aimee, Megan and everyone on today's webinar. My name is Ryan Brady and I have the pleasure of serving as Vice President of Glick Philanthropies. I'm a non-family staff member and I use the pronouns he him. I'm a white male. Today I'm wearing a light blue shirt and I have gray hair, something I've had since my early 20s, whereas my five-year-old daughter likes to say, "Daddy, you have white hair." I think I need to stop arguing with her. She's absolutely correct. Glick Philanthropies is an Minneapolis-based family of charitable initiatives dedicated to building community and creating opportunities that empower every person to reach their full potential. Annually we grant approximately \$25 million. Over the past 15 years we've evolved from a model where our founders Eugene and Marilyn Glick, personally direct to grant making to one led by professional staff.

Today our team includes four full-time team members, one of whom is a family member. We'll soon be adding a fifth team member with a new colleague starting tomorrow. Very exciting for us. In addition, we'll utilize the resources of the Glick company for functions like accounting and HR, and we have a long-standing partnership with our local community foundation, Central Indiana Community Foundation. For more than a decade, we relied primarily on the foundation's grant-making expertise and operation capacity to operate Glick Philanthropies our grant-making. As our work has grown and we've focused on deepening our relationships using trust-based best practice principles, our board has invested in building more capacity in-house. Although we still continue to have those partnerships and use outside advisors and consultants. All Glick Philanthropy staff are actually employees of the Glick company, something that we may touch base later. I look forward to sharing more about our structure throughout today's conversation.

But to set the stage, I want to highlight a few insights from NCFP's really fantastic report, the Trends 2025 report published in collaboration with Bank of America. To highlight a few points on the slide here. According to the 2025 report, 80% of foundations report having staff members. Of those that report having staff members 35 have only family staff. Of the foundations of family staff members, most have only one staff members, so tend to be relatively small in terms of family staff. 34% have only non-family staff and 12% have a combination of family and non non-family staff members. Older foundations with higher assets or more likely to use independent staff members. Staff members are most likely paid non-staff members, 36% or unpaid family members, 40%. And there's been a decline over the past decade in unpaid non-family, and using advisory consultants for daily operations. As the NCFP team pointed out, there's actually probably a healthy sign as there's more professionalization of staff and people. We need to think about how are we compensating those who are doing the work.

10% of respondents use advisors, consultants to lead daily operations and 23% of foundations surveyed added consultants or outsourced support rather than adding program admin or finance staff in-house. So as you can see from the data, the staff composition of foundations and family philanthropy varies widely. Hopefully you can see yourself in some of this data. And a key takeaway here is you're not alone. So to share more examples, I'd like to introduce our panelists, starting with Aimee. I'm going to turn it over to you to tell us more about the Boone Family Foundation, the structure and your role.

Aimee Boone Cunningham

Thanks Ryan, and thanks to everyone who's joining today. This is an awesome group We have. My name is Aimee Cunningham. My pronouns are she hers. I am a white woman with a short, dark, curly hair and bright red lipstick. The Boone Family Foundation is based in Dallas. It was founded in 2007 by my parents Garrett and Cecilia Boone. We started at about a \$60 million corpus in 2007. Right now, we're right at about \$6 million on purpose because we are spending down and we expect our last year of significant grant making to be early in 2026.

I am a team of one. We do have one person in our family office who helps with some of the accounting functions of the foundation, and we outsource our legal counsel and our CPA. Before I came on as a CEO in 2021, we had a CEO and she had an assistant and just especially as we were winding down the board, which is my parents and my brother and sister and sister-in-law decided that it just made sense for us to be leaner, because we really want to be in a position to direct as many resources to our partners as possible.

We focus in three areas on gender equity, on supporting organizations that are working to achieve equity for kids in public schools, particularly in North Texas and for parks and green spaces almost exclusively in the Dallas area. So that's it for me and again, very excited to be here. Ryan, back to you.

Ryan Brady

Thanks so much, Aimee. Really look forward to digging into your perspective as a staff of one and a family member. But Megan, I'd like to turn it over to you to provide your introduction.

Megan Costigan

Thanks, Ryan. Hello everybody. Thank you for joining today. My name is Megan Costigan, like they have already said. My pronouns are she hers. I'm a white woman with brown hair and I'm wearing a white and black striped sweater in my home office today. I'm a third generation Tracy family member and a full-time paid staff at the Tracy Family Foundation. My grandparents, RT and Dorothy Tracy, along with the second generation, their 12 kids and their spouses started the foundation in 1997. We were a team of two for many, many years. Up until 2015, we started hiring additional staff.

Today we have 11 staff, three are family and eight are non-family. We do have a board of 10 people, two are non-family and the other eight are comprised of the second and third generation. We fund really five focus areas, plus our Tracy family engagement is kind of the sixth bucket. And so we primarily fund in the 10 county region in west central Illinois. And those focus areas are youth, mental health, education and families. And then we fund everything in Brown County, which is the small community of about 2000 people where we are founded. We are funded on an annual basis by our company or our family's for-profit business called Dot Foods, also headquartered in Mount Sterling, Illinois. And so in 2024, our year in financials, we granted just under 10.3 million. And then this year, 2025, our grant's budget is just around 13 million.

Ryan Brady

Thanks, Megan, I'm going to stay on you for a second. You mentioned that in around 2015 you went through a pretty big change it sounds like, in terms of staffing up. And tell us more about that evolution and what were some of those factors that were involved in making the decision to add more staff capacity?

Megan Costigan

Yeah, so our family, like I said, my grandparents had 12 kids, they had 46 kids and now we are a family of 153 and it grows every month it seems like with marriages and babies. And so really what we wanted to do was think strategically. And so every five years we go through a new strategic planning process. We also have a long-term strategic plan. Within that is of course staffing structures. And so we're always trying to look ahead. Historically, like I said, we've been funded by the company Dot Foods, but when my grandparents passed away, they left a little bit of their estate to the foundation. We of course have some investments, but as we think about the second generation eventually passing away as they get

older and age up, we have to ramp up. And so we're trying to really think ahead. And so one way we do that is through an annual survey that we send to the second and third generation.

And so most of them have estate plans and plans for after life for what their funds and all their assets will go towards. And so that was one thing that we really started to think about is what could the influx of assets potentially be in five years, 10 years, 20, 30 years and beyond.

And so in order to be good stewards of the funds that we receive, we had to ramp up at that time. And so we started with hiring a non-family staff as kind of a program manager. He is still with us and in a new role now. And then the next staff person, so this would be the fourth staff that we hired, was a non-family executive director. It was our first non-family leader of the foundation, which we were all excited for, wanted. He was the right fit. He's amazing and still with us today as well. And so from there, we just, each year we look at our staff capacity, we look at what we're going to be receiving from Dot from their annual contribution. So what funds are we going to have and what staff do we need to really do what we want with those dollars to really try to make a real impact in our communities? And so that's kind of where we started. And then as we continue to ramp up, we continue to add more staff where it's needed.

Ryan Brady

Yeah. Fascinating to hear that you're linking that to your longer term strategic direction and you're investing in capacity, not before you need it, but as part of the strategy. That's a really excellent point. Aimee, you mentioned that your... I love the fact that your foundation is thinking about how you make the most impact now and you have a sunset date. From your perspective, tell us a little bit more about how you've come to your staffing structure and how does that feel to be a team or a person where you've got to cover a lot of areas in your role? Aimee, I think you might be on mute just to give you a nudge. I know-

Aimee Boone Cunningham

I'm the worst. How is this 20-

Ryan Brady

Not at all.

Aimee Boone Cunningham

... and I still can't do this? That's a great question. And I think that one of the reasons why we were able to get down to one person on the foundation side and one person on the family office side where previously we'd had five people on the family office side, and as I mentioned two on the foundation side is because when I came in almost four years ago, we moved to a trust-based philanthropy practice and we'd always leaned in that direction, but we still had a lot of paper that we asked of our partners to produce when we were either thinking about making a grant or as an annual report of funds that they had spent, even if it was a multi-year grant. And our family was really excited to lean into this practice because it is very much how we operate as a family.

My dad was, and my mom too, were one of the founders of The Container Store, and that was very much how dad ran the business is he invested in the people he believed in, and was really much more worried about elevating leaders and investing, putting resources behind them and their vision than he was in building a parochial structure. And so it just felt like the right move for us. And one of the benefits of trust-based philanthropy in addition to really empowering our partners is that it doesn't take as much legwork on our end. We of course still do a deep dive into financials before the board considers and

makes a grant, but when I came in, we had a grant application that was 11 pages long, and then at the very end said, "The board isn't going to read everything that you submitted, so can you please write an executive summary of this?"

And from our perspective, that was just no longer necessary, and it coincided really well with the decision to sunset the foundation, which was something that mom and dad always knew they wanted to do when they started the foundation in 2007. They said straight out of the gate, "We want the foundation to do the bulk of its work during our lifetime." And they're both still in wonderful health fortunately. But as you all know, and Megan, as you've just said, when there is a change in leadership or a change in strategic direction, it's a great time for staff to say to the board, "Guys, we've been talking about this for 15 years. When do we want to pull the trigger on spending down? Is it now? Is it in five years, 10 years?" And the board said, "You know what? We're ready. Let's do this." So it just was kind of the perfect confluence of these things moving together that led us to the structure that we have currently.

Ryan Brady

In prep call, we were talking about how you've seen one foundation and it's a good reminder of that the structure needs to follow what your goals are, and what the intentions are from the family. So Megan, let's dive into the to... We had a couple... Thanks to everyone who was able to submit questions beforehand. We'll try to address as many as possible and look forward to addressing more questions that are coming in as we get to the back half of the webinar. But Megan, let's dig into the topic of what family are eligible to potentially be considered to be staff. So what is your process for determining who might be eligible to be a staff member that is also a family member?

Megan Costigan

So we have a family council, and so we have a family handbook for some light reading. And so within that, there's of course lots of policies. And one of the policies within the handbook that family council created many years ago was that all third generation, now they're working on the fourth generation, but all third generation of family members, including spouses, have to work somewhere outside of the company, Dot Foods or the Tracy Foundation for at least three years. The purpose of that, my grandparents and parents, their generation, they really didn't want any of us to just come in and be given a job, especially if we don't have the skill sets for the job that's needed. And so we put that policy into place many, many years ago, and it's worked really well for us. It provides a lot of value. We get outside experience and we get to bring, if we decide we want to come work for the company or the foundation, we get to bring that outside experience and we're better people and employees because of it.

And so that's really the main criteria. And then of course to then be eligible to apply, you have to be a good candidate, you have to have all the qualifications and the skill sets that are needed for the specific job that you're applying for. There's some training, mentorship or testing that we'll go through if we so choose to do so as a third generation, if we have any interest in potentially at some point becoming an employee of Dot Foods or the foundation, and that starts towards the end of college timeframe. And so you can work with your mentor and there's some kind of informal, of course, in a mentor relationship, it's really up to the mentee to lead it and guide it. And so through that, I think there's some education and kind of leadership and knowledge that's transferred, whether it's informally or formally.

But aside from that, there's really no formal process I would say to become an employee. I would say the third generation or second generation back in the day, if we want to come work for the foundation or the company, we have to be the one to speak up and show that interest, and they're not going to

come ask us to do that. Our goal at the end of the day is not to be a family run business or foundation. We want the right people who know how to do the job in the position that are needed at the foundation. So that's really the main goal.

Ryan Brady

Yeah, a lot of best practices there, Megan, I'm sure. I was certainly jotting down some notes in terms of I love the process and then the theme there that I heard is intentionality. Just for adding a little bit of perspective from Glick Philanthropies, which is there is a active company, the Gene Duquette company, and then the family of charitable entities, Glick Philanthropies. We have one family staff member. The process that we went through, and honestly we base this on legal counsel too, is to say we write one job description. If there is a family member who is interested in that position, they would have to qualify, they'd have to meet the requirements of that job description. So that's a practice that we were advised on. It's, I think worked really well in terms of... The job description is based on the needs of our goals and strategic plan, like you said, Megan, rather than someone's desire to fit where they want. It's great that there might be alignment, but we certainly are basing that job description based on our goals.

The other side of it is that's for paid staff from staffing the work. We have family members that are serving on our grant making committees on our board. So there's a combination of ways that you can get involved, and we are borrowing some best practices from our peers at the Ball Brothers Foundation around an intentional kind of next generation engagement process in terms of, we haven't fully implemented it yet, but we are hoping to launch a program that it would be essentially a formalized cohort based program for next-gen family members to go through essentially a philanthropic crash course in terms of both getting to know our work, getting into the sector. They would then become eligible for board consideration. It wouldn't be a guaranteed placement, but that would be a criteria for board consideration. Again, we are still getting full executive approval and designing that program, but we hope to roll it out. There may be other models out there, so look forward to hearing if you have any, please throw those in the chat.

Megan Costigan

Love to learn more about... Oh, go ahead. Sorry.

Aimee Boone Cunningham

Oh no, go ahead Megan, please.

Megan Costigan

I was going to say I'd love to learn more about that, Ryan, from you if you do implement it.

Ryan Brady

Sure.

Megan Costigan

We also, to piggyback off of that just for a second, we have committees too that are non-paid that all family members, anybody can participate or serve on a committee, and it's a one-year term. There are different levels of commitment based on the committee and what their goals are for that year. But that's one way we really try to give the family a menu of opportunities for engagement. So we know everyone goes through ages and stages throughout life and they have different interests, different

capacity for engagement, and so try and provide lots of different opportunities is one way that we try to engage or give those opportunities to the family.

Aimee Boone Cunningham

Go ahead. I love hearing you guys talk about this. We have at Boone Family Foundation, a very different approach, mostly because we're so small. My husband and I have four kids. My sister has three kids and my brother has one kid. My youngest is 21 and my sister's youngest is five. And so we have between my siblings and I have kids of very different ages. And because we were spending down, we actually never talked about having the third generation serve on a board because it was going to be such an unequal opportunity for my young adult children versus my siblings children. So the conversations we had were really, after my brother and sister and I got married, did spouses want to serve on the board. And we had a period where my husband and my brother-in-law and my sister-in-law were serving on the board for various reasons.

My husband and my brother-in-law rolled off, and now it's just my sister-in-law. And while that may not look on paper like an equal treatment of in-laws, it was one that worked really, really well with everybody without having a policy in place behind it. I will say that since I came on as staff, just because of wanting to be super belt and suspenders and to avoid any appearance of self-dealing with the IRS, we move to a much more formal structure of me going through a performance evaluation every year. I do a self-evaluation, my board does an evaluation survey, I present it to the board, they provide me with feedback, and then every year we have a conversation about compensation, whether that's a bonus or a compensation increase. And I just want to name the fact that for family members who are staff, that can be a little bit of a sticky wicket.

I mean, it's talking about money with your family for some families is really easy and conflict free and for others can be uncomfortable. But I think that the most important thing that we have done as a family with our foundation work is set up really good boundaries. So when I'm showing up with as presenting to the board at a board meeting, I'm not showing up as a sister, a daughter. I am showing up as their paid staff person and then I can take that hat off, and we all go run around at the pool together or whatever. But that switching of I'm here as your employee, I'm here as your family member, has been very important to make sure that the dynamics in our family continue to work in the way we all want them to.

Ryan Brady

No, Aimee, you've kind of opened up a great conversation of what are some challenges and also benefits. And I think you highlighted a couple of how do you talk about compensation with family members? That adage of you can be a staff member from nine to five or family member, but not both. And how do you take those hats on and off, but Megan, Aimee, open up for the honest, just let's all lay it all out. What are some challenges and benefits of both paid staff and non-paid staff of your current structure, and what advice do you have for everyone on the webinar to consider?

Aimee Boone Cunningham

I think when I was brand new in the job, we had a board retreat and my sister-in-law asked me in advance, an in-person retreat, "What is the attire?" And I said, "Just whatever you want to wear that's comfortable." And I walked into the meeting in a blazer and slacks and she said, "You told me I could wear whatever I want." And I said, "Yes you can. I'm at work." So I think just out of the box, being super clear about when you are what is really important for family members who are staff.

Megan Costigan

Yeah, when I first started, my mom was the president since 1997. We were founded up until we hired an outside family member as the ED. And so she was serving as the president and the ED for many, many years. When I started at the foundation, I know her as mom.

And so there was that kind of balance and that kind of awkward of do I call her mom or do I call her Gene? And I remember it was probably a year or two into working for the foundation and the two of us were out traveling to talk to another family foundation and present to their family and their next gen group. And I was talking to one of the family staff and her dad was who she reported to, and she said she always calls him his name at work and outside of work it's dad. Ever since then, that's really stuck with me and it does help put that line in personal versus professional, and it keeps things a little bit separate because as we all know, when you are working with family, there are many, many benefits to that, but there are some challenges like we're talking about. And trying to keep that separation, that has been very helpful for me.

Ryan Brady

Yeah, thanks Aimee and Megan for being so open. And we'll highlight some amazing resources that NCFP has for staff who are family, an affinity group and for non-family staff members. And Britt will highlight those at the end of our call today. Just some benefits and considerations also, to throw out. Glick philanthropy story again, Eugene and Marilyn Glick founded the company and what we now call the philanthropies and they did it themselves, which is amazing and that might not be that uncommon from founders from a greatest generation perspective also. One thing that we certainly found as a benefit, I'm a little biased because I got the chance to be there at the start of this, is the Gene and Marilyn Glick had set up a donor advised fund at the local community foundation, Central Indiana Community Foundation. And as the second generation I was thinking, how do we build some infrastructure?

In this case it was relatively new to the second generation. Gene and Marilyn did amazing work in the community, but the second were, and there was a fantastic kind of transition of handing the baton, but there wasn't as much runway to transition all of that, the decades of knowledge and experience to the second generation. So one benefit that I saw is how can family philanthropy and family foundations leverage existing resources in the community? I certainly am an advocate for are there resources in your community if you're a place-based funder, if you're a broader kind of focus area funder, can you partner with anyone? So in this case for about a decade plus, the grant team at Central Indiana Community Foundation really staffed, were the program officers for Glick Philanthropies and it was, there's so much benefit to that. Certainly to Glick Philanthropies there's been tremendous benefit.

And I hope that there's been benefit to the community foundation too, because working together in more resources coordinated. So one thing to consider that can come through a community foundation. It depends on the capacity of your local community foundation or if you're a place-based funder. But even nowadays, we're thinking about for our community-based grantee partners, the conversations around in this time, How do you merge? Should you merge? Should you collaborate? How do we share resources? How do we make dollar stretch even further? How do we do that from a grant-making perspective too? Is there another foundation in town that you could share a grant officer with? How do we think in the same way that we're trying to maybe ask our grantee partners to think?

So that's something to consider. We had a couple of questions that came in before in preparation around the decision around resource allocation. How do you make those difficult decisions when our community-based organizations and our grantee partners are stretched thinner than ever and they face

many challenges? How do you make decisions about allocation of limited resources in terms of staffing and Aimee, Megan, any thoughts or considerations that you'd like to highlight?

Aimee Boone Cunningham

Megan, do you want to go first?

Megan Costigan

Yeah, one thing that I can give a kind of a concrete example, and I love the idea of partnering with community foundations and other similar organizations, because I really do think they offer a huge value to communities, and they can do so many different things to help based on what your specific needs are. We know we are not the experts in what we do. The organizations and our grantee partners are the experts. They're the ones doing the work day to day on the ground. And so we really do lean into, all of our staff lean into the organizations that we're working with because they are the experts. And so we also know that it's easy to feel siloed in this work sometimes, no matter if you're a one person staff or 11 person or however many people you have on your team. I think having conversations like this, and I think participating in peer networks like NCFP offers, I think those are great ways to network and kind of brainstorm and bounce ideas off of each other.

But one thing that we did is we partnered with multiple organizations in a small community nearby us. It was for youth programs specifically, but they had a ton of youth serving organizations. None of them were working together or not very many of them. And so we thought, why are we not collaborating? What can we do as funders to help initiate more collaboration within this community and all these organizations, because they're a duplication of services and they're meeting, they're targeting the same exact audience? And so we a handful of years ago brought together 10, 15 organizations, leaders from this community, and now they are their own 501(c)(3). They operate as a board, they're their own legal entity, but we still support them. But at the end of the day, really the goal was to bring people together, because we're all doing the same thing. We all have very similar goals at the end of the day.

Another thing that we've done is as a staff, we do listening tours and we also do brainstorming one, two, three hours with organizations and we bring as many of them what to come together as possible into one location. And that not only helps us as staff because we're learning from them, and then that long-term and short-term helps our capacity, but it helps the organizations too. So I think really just working together and getting outside of your comfort zone, maybe your outside your four walls, wherever your office is located, and really making those connections and using the resources that are in your community or throughout the nation because there are so many that are out there and that can help in many different ways.

Aimee Boone Cunningham

Megan, I just want to hit a huge plus sign on what you said about leaning into the expertise of your partners, and that's something that the Boone Family Foundation has always embraced. And now with our transition to trust-based philanthropy, we're extra plus sign doing it. Really embracing the fact that as a board, as an organization, we decide we want to work in reducing Black maternal and infant mortality, which is a huge challenge in Texas that we don't know what the best use of resources is, but the organizations that are on the ground working with Black pregnant people, Black postpartum people, they do know. So let's just say "We believe in you. We know you guys are doing good work. Here are some resources to do it." And the only other thing that I would add to what you just said too is particularly with the way that federal funding cuts and freezes have been so detrimental to many

organizations on the front line, whether it's education, healthcare and economic development, things like AmeriCorps. And this is really leaning into the fact that clarity is kindness.

And so when we have organizations calling and saying, "Oh my God, we just lost seven or eight figures in government funding, we need help," I can open up my Excel spreadsheet because we're pretty low tech and say, "We either have X number of dollars that I can go to the board and ask for this," or "I'm so sorry, we don't have the resources to help, and let me see if there's something we can do outside of writing a check to support you." And I think that even when that's not the answer that an organization wants to hear, not leaving folks twisting in the wind when they're really probably going to have to make some tough choices is something that is a value that is really important to us.

Ryan Brady

Yeah. So yeah, so many great ideas here just to maybe highlight a few, that idea of how can the community guide and staff the foundations, but how do we also fairly compensate and honor people's time? One example I've seen out of the Indianapolis Foundation is a program called their Community Ambassadors Program where they were structured, the ambassadors not full-time staff, but they're advisors, they're consultants from the community and they're compensated and it's professionalized. And I think that kind of model of if we're going to ask for community involvement input on the grant making committee, how do we... making sure that we're honoring that time and that work. That other idea that we had a question of, do we consider transferring resources directly to the community to... If you're struggling with capacity on the grant making side, is there a way to empower the community directly to help guide that grant making? So if you want to share any thoughts or models or websites or links, please throw those in the chat as we're having this discussion. But to kind of transition to our Q&A part, Megan-

Aimee Boone Cunningham

Can I just add? I'm sorry to interrupt you. One thing to what you just said, particularly about compensating community leaders or organizations for their time and expertise. I think that is especially important if you are as we are, a white family asking for expertise from Black, brown, or indigenous communities, that kind of expertise, it's not free. And if as a family we're asking people to provide that to us for free with their own labor and knowledge, then we are actually part of the problem and not part of the solution.

Ryan Brady

Yeah. Aimee, thank you for uplifting that. That is incredibly important for us to hear. As someone said to me once, "Ryan, you're paid to be at that meeting, why shouldn't other people?" And I think that really stuck with me. And that is something that we all need to reflect on and think about. In terms of making those decisions about how to allocate resources, especially right now more than ever, it's a tough call because we need to get money to the organizations that are doing the most important work. One thing that we've considered, we have looked at, we do some ratio analysis around operating expenses to grant making budgets and just we benchmark some pure foundations. Again, that helps us understand. We've also, I think the thing that our board has really in our strategic plan is when we say kind of that support beyond the check when we've kind of said "We need to do a better job in communications and advocacy and engagement in building deep partnerships."

Those have been the driving factors of those thresholds to say, "How do we best do this?" And in some cases we've landed on how do we lean on the consultants to help us do that, or how do we better utilize our grantee partnerships in terms of listening? And in a couple of cases, we said "The best way to do

that is to make a change to our organizational structure through additional FTE or additional person." So we have so many great questions we want to allow for that space. Britt, I welcome, I know you and the NCFP team have been monitoring the chat, but to kick us off, I'd like to... I'm going to just go to some of the questions that we've received. Let's talk about that, the use of outside advisors or consultants. Megan, have you any advice or considerations as related to the topic of using engaging professionals that are more flexible in terms of their engagement?

Megan Costigan

So we have, like I said, we're operating family business. And so although we don't have a formalized family office, we kind of have an embedded family office. And so we're fortunate in the fact that we operate side by side, and can utilize some of those resources rather than going outside to get additional consultants. We of course have outside legal consultants and counsel that we use on a regular basis for lots of various things. One thing we've always done, I think we didn't do it one year and realized that we should always use an outside consultant for strategic planning and for our family retreat. So we do a family retreat for the foundation every three or every three to four years. And having an outside consultant facilitate and lead those meetings with the family has been so helpful. They're unbiased and they know as much as they need to know, and they're really good at leading those discussions and not getting us off track.

Because as a large family or a small family, it's very easy to get off track sometimes. And so I think having outside consultants for strategic planning, family meetings or family retreats, legal counsel, and then a lot of other stuff, we use kind of our embedded family office. But I will say, you were talking a minute ago about committees and whether they're paid or unpaid. The committees that we have, we have roughly eight or nine different committees and they're not paid, but we do ask some really good partners that we work with on a regular basis who are leaders in that specific area of who we're funding. So whether it's the mental health focus area, for example, we ask and recruit mental health leaders in our small 10 county region in Illinois to serve on those committees for a one-year term. And that's been really helpful for us too, but they're not paid, but there are benefits for both sides to do that. And then for our two non-family board members, those are paid positions.

Ryan Brady

Great.

Aimee Boone Cunningham

I absolutely agree with Megan with what you said about using a consultant for strategic planning and or family retreats that are about the foundation for two reasons. First of all, because then that allows me as a staff to be fully engaged in listening and not worrying about facilitating, which is just helpful for me as a CEO. And it is awfully nice too, to have somebody leading that conversation who is really focused on the strategic planning and is not thinking, am I concerned about this or am I mad about something that happened when I was nine? So just having that little bit of remove from the family, somebody who can really be an honest broker, and be a person who can call family in to staying on task. For our family the danger is that when we all are together, we're all kind of silly. We want to be playing and having fun and running around with the kids and things like that. And so it's great to have someone who says, "Okay, you can do that at 2:30, but we have to stay on task until then."

Ryan Brady

Yeah, no, that's great. And if anyone has any recommendations or thoughts on that in terms of where and when we've used outside consultants. We have moved to an every other year off-site retreat that's more focused on bigger picture, strategic planning kind of related work. And then, so those happen, in this case, those happen on even years and all family members are invited. The structure that Glick Philanthropies has for the family foundation it is for board members it is mainly direct descendant family members with a couple long-time Glick Company employees that serve on the board. For odd number of years we are primarily Indianapolis, place-based, grant maker, not exclusively, but more than 80% of our grant making is focused in Indianapolis. We invite, essentially for a multi-day site visit where we go deep with grantee partners locally, we talk about topics, and it's also a good next-gen engagement, family bonding time.

We have added, and this has been give credit to Ben Grande, our staff member who is also family for really bringing this idea to the table. We do a family or a volunteer activity. This happens to be, and it's all ages from two to on up, and that's our kind of closing activity. And it's a really nice chance to come alongside both as staff and as non-family staff and as family. I love bringing my kids to it or our kids to it, and it's a really nice way to kind of feel like part of the broader extended family of Glick Philanthropies. So an idea there is, yeah, how do you create that kind of emotional engagement with the work, even if especially as families become more and more geographically spread. If you have any questions that you'd like us to make sure we address, please put those in the chat. Here's one that came in. Have you had a situation where two family members have applied for the same position? Megan, maybe I'll direct that to you. You may have had to navigate that.

Megan Costigan

Yeah, so my cousin and I actually, so when they first hired or posted the position for my role when I came on as staff in 2018, the foundation was open to one full-time or two part-time staff, and they really, because the role was pretty heavily focused on family engagement, they really wanted it to be a family member in the position. That's the only time I would say that that piece was really important is having a family member in that position. It didn't have to be, but it's an ideal for us.

And so a few of us, I don't even know how many applied for the position at the time, but my cousin and I both were offered a part-time job and we both were open to, part of the application process was are you open to part-time and or full-time because of the stage of life that we are both at with careers and families and all that, we were both open to the part-time, and so we both came in as part-time. Every other job I would say it is not released to the family, it is released to the world more or less the public. Honestly, I don't know. I'm not involved in every single hiring process, but I do not think that that's ever been an issue. We've gone through a lot of hiring and to my knowledge, that hasn't been an issue, at least at the foundation.

Ryan Brady

Great. Thanks Megan. We have not run into that yet. Megan. Aimee, what advice do you have? As you reflect on both the staffing structure at your respective foundations and thinking broadly, what have you not had a chance to share? Any kind of overall words of wisdom?

Aimee Boone Cunningham

I think the thing that, and this is just partly how my brain works, to me the thing that is your friend when you're in a family foundation is process. Whether it is the processes for hiring Megan that you and Ryan both have described, whether it is having airtight bylaws, whether it is having policies and procedures for conflict of interest, policies for the kind of expenditures that are allowable to reimburse for family

members when they're traveling on foundation business. I think that having a big flashing clarity is kindness sign over the top of your foundation, both for your partners and for family members, that it just makes everything a lot easier.

And I'm kind of a Robert's Rules of Order nerd, but when I came in as staff, we hadn't really looked at our bylaws in particular, how the bylaws would come into play when a time comes, when both of my parents had have passed, which hopefully will be a long time in the future, but really thinking about, yes, the strategic planning, but also the legal implications of what happens when you have founders who have passed, whose estate plans then implicate what the foundation may have in terms of resources, what it may need to do.

So I think that that kind of, it's good fences build good neighbors, good governance builds healthy family relationships when it comes to philanthropy.

Ryan Brady

Megan.

Megan Costigan

I agree with everything you just said, Aimee. I think for me personally, we have a really large family and we allow spouses to be involved in anything they want to be, whether it's the board seat, if they apply for a job position that's open, if they serve on a committee, there's lots of different ways to get involved. And so I would say whether it is a paid or non-paid position, every voice matters. And just giving family members or non-family members that are somehow involved in the foundation, a seat at the table is really important. And having that open door policy, kindness is clarity and all of those phrases we could throw out there, it makes such a big difference. And in 153 plus family members, there are so many experts in so many different areas. And so for us, really leaning into what expertise we have within our family is very valuable for us and providing lots of different opportunities.

And I think I said we didn't really have a streamlined or formal process for onboarding youth to an adult, to a potential job position. We do start formal education and different programs for family members at the age of five. And so I would say too, if you are a foundation that wants family engagement and family involved as potential staff paid or non-paid, getting them involved as early as possible and really educating them on all aspects of what the foundation's work is and what the strategic plans are and the mission, the vision is really important and that's worked really well for us. So I always say it's never too young to start. We've picked the age of five. It's made sense for us. It's always worked. And so yeah, start young, and I think I said this earlier, but also remember that everyone goes through ages and stages and that's okay.

Aimee Boone Cunningham

Yeah.

Ryan Brady

Well want to thank you both for such a rich conversation and going to invite Britt back on for our final thoughts and closing polls, but just highlight, there are no two foundations alike, but you're not alone and you've got resources at NCFP. So Megan and Aimee, thanks for a really rich discussion and I'll turn it back to you, Britt.

Britt Benavidez

Thanks so much, Ryan. Thanks for moderating and adding your insights. Aimee and Megan, thank you for being so open about your journeys as family staff members. We're very grateful for your time and expertise and all the guidance that you shared with us today. And thank you for our audience who submitted so many questions when they registered, it really helped us shape this program. So I'm going to launch a poll here that'll leave open for the remainder. We would love to hear your feedback about today. If you have ideas for future programs, if you have additional lingering questions. We really take this seriously as we build out our programs so that we can meet our member needs. Jen, can we bring the slides back up please? Thank you so much.

All right, so as you may know, we've recently released our trends in Family Philanthropy 2025 report. Ryan referenced it at the beginning and we pulled some of that data to help us shape this conversation. This is our third national benchmark survey of Family Foundations released every five years. The report tracks the leading trends in the field of family philanthropy. It includes data on asset sizes, payout rates, grant making, family dynamics, and much more. So you can download the full report on our website.

We're also thrilled to introduce the second edition of our Family Giving Lifecycle. It's a seven-stage framework that captures the major decision-making points and opportunities across a family's philanthropic journey, and is designed to guide donors towards effective and meaningful outcomes. We've refreshed the primers to be more interactive, streamlined, and we provide a playbook to help you work through and capture this content with your family. The Lifecycle Framework applies to families at all stages, whether they're wealth creators just starting out or multi-generational families improving their practice.

You can learn more and explore the new additions on our website. They are hot off the press release this week, so we hope that you use them and they're valuable to you, and please share your feedback as you dig in. As we get ready to sign off, we have a few very quick announcements about our upcoming programs. We always love to hear your feedback and ideas on topics that interest and resonate with you and have taken that feedback on past programs to develop this lineup for the Fundamental series. Next month's webinar will be Evolving your Family Philanthropy, Bold Transparency, and we'll discuss the ways that philanthropies are sharing and learning with partners and centering transparency in their operations and grant making. Our full series can be found on our websites, and we hope you'll continue to join us the second Tuesday of every month.

In addition to our webinars and programs, we're also pleased to offer a range of peer networks. For those of you interested in connecting to family philanthropy, colleagues with similar objectives, challenges, and shared experiences, we're thrilled about the launch of our family staff peer network. We're grateful for Aimee for leading that network as a co-chair. Relevant to today's discussion, we have our family staff peer network, a non-family staff peer network, and Ryan also highlighted partnerships with community foundations. We do have a community foundations peer network as well. So there's truly something for everyone, and we hope you dig in and join there. We can find out more about all of our peer networks on our website and can always email us for more info. Thank you everyone for joining us today. A reminder that the webinar recording and related resources will be sent out shortly. I hope you'll join us on September 9th for our next webinar. Thanks again, Ryan, Megan and Aimee. Take care and see you all soon. Thanks.