

Philanthropy in Complex Multigenerational Families:

Balancing Individual Preference
with Collective Purpose

A Companion Guide

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1. Introduction

In 2023, the National Center for Family Philanthropy (NCFP) published “Philanthropy in Complex, Multigenerational Families,” a study that explores how “complex” families—those with multiple generations of participants and varied giving vehicles—evolve their philanthropy. The report examines how families balance competing purposes for their shared giving, with special focus on the tension between individual and collective goals: *Is the philanthropy primarily designed to support the personal philanthropic preferences of individual family members or to support a shared vision for the family’s giving?*

This fundamental question tends to surface during periods of transition, such as the involvement of a new generation, the retirement or death of influential leaders, and the growth in assets and philanthropic funding. In our work with hundreds of philanthropic families, we know that ambiguity and disagreement about this question can cause friction in family philanthropy. By sharing what we have learned from families who have grappled with this question and thrived through generational transitions, we hope to help other family philanthropies improve their practices—and increase the joy and impact that comes from doing this work together well.

As a supplement to the research study, we have designed this companion guide to help families make those lessons actionable. It will give family members common language to name the issues they are facing, discuss options and trade-offs, and make effective decisions about their future direction.



Who Should Use this Guide

This guide is intended for families who are in periods of transition, when questions of purpose and engagement come to the fore. Family members, each with their own experiences and aspirations, may find they disagree on the path forward. These fundamental disagreements on purpose and goals can present in many ways, such as:

- ❖ Growing dissatisfaction with “scattershot” giving and a desire for greater impact
- ❖ Next-generation family members questioning the way things work
- ❖ Frustration with “loud voices” that exercise outsized influence in the family’s philanthropy
- ❖ Friction between board members and staff members regarding their respective roles
- ❖ Difficulty agreeing on funding requests

If any of these situations sound familiar, keep reading.

The guide is designed for families at all stages of development, from those beginning to think about establishing a family philanthropy to those in the fifth or sixth generations in their family philanthropy; for practitioners who do this work together—family members, nonfamily board members, and staff members; and for advisors who work with family philanthropies.

How to Use this Guide

You can use this guide in different ways: You can complete the exercises during a multiday family retreat as part of a comprehensive continuity planning process, starting at the beginning and working through all the exercises. Or you can use it in a targeted fashion, using the sections that apply most to the presenting issues. You can return to the guide as your family philanthropy evolves over time and new challenges emerge.

The guide begins with an assessment of the current status of your family philanthropy: the degree to which it is collaborative or individualistic, and family members’ interest in and readiness for change. Based on the results of that assessment, you can navigate through the guide to find exercises and tools to meet your objectives, including:

- ❖ Reaching consensus on divergent perspectives
- ❖ Designing effective individualistic family philanthropy
- ❖ Designing more effective collaborative family philanthropy
- ❖ Designing effective discretionary giving programs



Before You Begin

- 1. Read the report:** This is a companion guide to “Philanthropy in Complex, Multigenerational Families.” We encourage you and those participating in this process to read the report—or at least review the executive summary—to ground yourself in the concepts and terms we use throughout the guide. This guide will refer to specific sections of the report for additional information.
- 2. Choose a leader(s):** It is important to identify someone who can move the work forward. Although an outside advisor or nonfamily staff member may provide valuable assistance, the most successful efforts tend to have at least one family member who champions the endeavor and rallies others to embrace it. It will also be important that there is someone—a family or staff member and/or consultant—who can do the necessary work involved, such as fielding surveys, analyzing data, and preparing reports. Many families find that it is helpful to create a committee to oversee the process.

Definitions

Terms we use frequently throughout this guide:

- ❖ **Individualistic family philanthropy:** Family philanthropy that is primarily intended to support the personal philanthropic interests of individual family members. Each participant has relative autonomy to support their interests through a system of “peaceful coexistence.”
- ❖ **Collaborative family philanthropy:** Family philanthropy that is primarily intended to bring the family together around a shared philanthropic agenda. This model prioritizes shared decision-making and limits individual influence. In collective family philanthropy, personal interests are addressed outside of the collaborative giving.





2. Understanding the Current Status of Your Family Philanthropy

To plan for the future, you first need to understand where you are now. In particular, you will want to ask:

1. Is our family philanthropy currently operating in an individualistic or a collaborative manner?
2. How much are family members interested in changing the way the philanthropy currently operates?

Answering these questions will help you determine how participants understand the purpose of the family philanthropy—and whether your practices are aligned with that purpose—as well as participants' hopes for its future. The exercises here will help identify the issues on which participants are more or less aligned, so that you can prioritize addressing the topics on which there is less agreement.

Step 1: Take the Assessment Survey

Take the survey found in the appendix on page 28.

Instructions:

Anyone participating in your family philanthropy should take the survey, including:

- ❖ Current family board members
- ❖ Nonfamily board members
- ❖ Family members who do not currently serve on the board but are familiar with the the family philanthropy (e.g., prior board members, committee members, etc.)
- ❖ Staff members who are familiar with board operations

Survey respondents should send completed surveys to the leader(s), who can aggregate results and produce a summary report. This report can be a basis of discussion at a foundation meeting. When discussing the results, consider the following reflection questions. (You can share these reflection questions along with the report in advance of the meeting to allow participants more time to reflect.)

1. What surprised you about the survey results?
2. To what extent are participants aligned in their perceptions of the current model and aspirations for the future?
3. Where is there alignment? Where is there disagreement?
4. Imagine your family in another decade. If you continue your current approach, what would be the likely outcome(s)? Consider the future impact not only on your giving, but also on personal satisfaction, family involvement, governance, and family dynamics. What aspects would continue to work well and what would be challenging?

Considering the survey results and discussion themes, where are participants aligned on their perceptions about the current model, and where is there disagreement? Where are they aligned in their aspirations for the future, and where is there disagreement?



Step 2: Grant Analysis Exercise

The use of different types of grants can indicate collaborative or individualistic approaches. This exercise helps you evaluate your current giving to determine the degree to which it reflects individualistic or collaborative goals. We recommend that all users do this exercise to complement the survey from Step 1.

Instructions:

1. Compile a list of all grants made during the past three years. Code each grant according to the six categories listed below. (Note: These grant categories are not black or white, nor are they mutually exclusive. Some grants may fall into multiple categories. For the purpose of this analysis, select one category that best describes each grant.)
2. Next, add the totals for the data in Rows 1 to 4 and Rows 5 to 6.

GRANT ANALYSIS TABLE	Number of grants	Percent of total grants	Grant amount	Percent of total grant dollars
1. Legacy grants: Projects you support because they are or were important to the founder(s). These may be grants that are automatically renewed, with little discussion, or they may be larger, one-time grants to institutions you have historically supported.				
2. Discretionary or matching grants: Grants that are made on the recommendation of individuals, with a defined personal allocation level.				
3. Grants to organizations in which participants are personally involved or will receive personal recognition, e.g., board service, alma maters, local parks, etc. (This may be a subset of discretionary giving.)				
4. Board or family-initiated grants: Grants that are proposed by family and/or board members for funding via collective giving funds (not including discretionary or matching grants).				
5. Staff-initiated grants: Grants that are brought for consideration by staff members or advisors, based on fit with funding guidelines of the foundation.				
6. Strategic grants: Grants that fit defined focus areas for the foundation, with clear guidelines and selection criteria.				
TOTALS				
7. Totals for Rows 1 to 4				
8. Totals for Rows 5 to 6				



Analyzing the data

Rows 1 to 4 are grants that indicate a more individualistic model.

Rows 5 to 6 are grants that indicate a more collaborative model.

In general, if the total percentage for Rows 1 to 4 is greater than 50 percent, your giving is primarily individualistic.

If the total percentage for Rows 5 to 6 is greater than 50 percent, your giving is more collaborative.

Prepare a report with this information to share with participants, with the reflection questions below, to serve as a basis of discussion at a foundation meeting.

- ❖ What is surprising to you? Are there places where this data differs from your perception of how things work?
- ❖ Were there grants that were difficult to classify? If so, which ones and why? Are the grants in question more individualistic or collaborative? If it's not clear or there's not agreement, why is that?
- ❖ As you review the grant list, are there grants that the board discussed more extensively and/or intensely? What about those grants required more time and discussion?
- ❖ Does this grant snapshot and the results of the survey, portray the foundation as you would like it to be? How would you like it to be different?

Step 3: Determine Where You Stand Today

Reflecting on the results of the survey and the grant analysis exercise, and your family's discussion about these results, consider the following questions:

- 1. Individuation vs. collaboration:** Is our family philanthropy operating in a primarily individualistic or collaborative manner? Does it have aspects of both? If so, which is dominant?
- 2. Current satisfaction:** What are participants' perceptions of our family philanthropy? Are participants generally satisfied with the current state? In what areas are they more or less satisfied?
- 3. Alignment:** To what degree are they aligned on how things are going? In what ways are they more or less aligned?
- 4. Desire for change:** What are participants' aspirations for the future of the family philanthropy? To what degree are they aligned on what they want going forward?

With greater clarity about how you are currently operating, as well as participants' perceptions about the current state and aspirations for the future, you can determine what next steps to prioritize.





Step 4: Choose a Path

With a clearer understanding of the current state of affairs, you now need to decide on a path for the future. Do you want to work more collaboratively? Allow for more individual autonomy? Continue with the status quo?

Choose the description below that best describes your family and go to the indicated chapters.

If you are currently operating...

- ❖ In a primarily individualistic manner and there is agreement to continue this way for the foreseeable future, go to [Chapter 4](#): Strengthening Your Individualistic Philanthropy, page 12.
- ❖ In a primarily individualistic manner and there is agreement to move to a more collaborative approach, go to [Chapter 5](#): Designing Effective Collaborative Family Philanthropy, on page 15.
- ❖ In a primarily collaborative manner and would like to operate more effectively, go to [Chapter 5](#): Designing Effective Collaborative Family Philanthropy, on page 15.
- ❖ In a primarily collaborative manner and would like to operate more individualistically, go to [Chapter 4](#): Strengthening Your Individualistic Philanthropy, page 12.

And if, like in many families, there are different opinions on how to proceed, go to [Chapter 3](#): Addressing Different Perspectives, page 9.



3. Addressing Different Perspectives

For many families, the prior exercises and discussions will surface a difference of opinions about the purpose of family philanthropy. The question is now how to proceed in light of that divergence.

Most family foundations begin with an individualistic purpose: to support the founder's philanthropic priorities. Some maintain that individual approach over generations while others evolve to become more collaborative.

During transitions it is common to have some members clamoring for change, some who wish to stay the course, and still others who have questions or concerns. Sometimes these different opinions fall along branch or generational lines; sometimes they are about participants' worldviews or ideologies; sometimes they are related to members' programmatic or geographic interests; sometimes they have to do with different interpretations of the donor's intent—and oftentimes they are some combination of all these factors.

Before moving forward, you will need to understand what's behind any support or resistance to change. Change can be hard when all parties are deeply invested. This is an ideal time to consider engaging outside support. It can be easier for a neutral advisor to objectively listen to all participants and resolve disagreements.

Dive Deeper Into Participants' Perspectives

Discuss the survey and grant analysis results and subsequent discussions from Chapter 2 with the philanthropy's decision-makers (board members or others who will influence decisions about the future). You can do this in a one-on-one setting, in small groups, or all together, depending on family dynamics and logistics. The goal is to have a clearer sense of where each decision-maker stands so that you can devise an approach to move forward. Questions to explore now include:

1. Where are participants aligned/not aligned when it comes to purpose, values, and motivations?
2. Do some participants wish to maintain or increase individual giving? What is their motivation and what kind of autonomy do they desire?
3. Do some participants wish to maintain or increase collaborative giving? Why?
4. For those who are averse to change, what are their concerns? What do they feel might be lost by the changes?
5. For those eager for change, what do they hope to achieve by operating in a different manner?

Understanding the motivations and concerns of the group can help you to identify areas of common ground as well as specific issues that may cause friction. As you reflect on perspectives within the group, consider the following questions:

- ❖ Is there a clear majority perspective? If so, how might you address minority concerns? (See below for structural options that might enable the majority to move forward.)
- ❖ What questions remain, and what additional information might help answer them? (See below for suggestions on learning activities.)

If participants have deeply held and divergent perspectives, it's probably time to bring in outside professional help such as a neutral, experienced advisor.



Learn Together

Sometimes the next best step is getting more informed. It is important that everyone has a shared language and baseline of knowledge to make thoughtful choices about the future. Opinions tend to shift when participants have access to more and better information. Indeed, people frequently engage in continuity planning with assumptions that are often untrue. Our research identified several findings that run counter to common perceptions including:

- ❖ Next-generation (third generation and beyond) family members are more eager for collaboration than their predecessors. They want to work together and are more willing to find common ground across differences.
- ❖ Family members' engagement and satisfaction in the family philanthropy is not related to whether the foundation supports the issues and places they care most about. Diluting the focus to accommodate the expanding interests and geographies of the family is not an effective engagement strategy.
- ❖ Creating a distinct outlet for personal giving—inside the foundation in the form of discretionary giving or outside of it through other vehicles—can help serve as a “release valve” to ensure that personal agendas don’t cloud collaborative giving.

Additional information can help expand participants' understanding of the possibilities and loosen their attachment to a particular path forward, making it easier to identify common ground. The following resources can help inform your discussions:

- ❖ Encourage participants to read the [research report](#) and discuss the findings and implications for your family’s philanthropy. Direct them to the sections most applicable to your situation.
- ❖ Use the case studies from the report as a way to discuss possible models for the future.
- ❖ Share a related [webinar](#) or other [resources](#).
- ❖ Reach out to other family donors who have experience with implementing collaborative and individualistic family philanthropy.

Once people have more information about possible outcomes and trade-offs, follow up with a conversation to see if perspectives have shifted. Is there more willingness to compromise? More comfort with the current situation or readiness to change? Most critically, are participants able to align on a common vision for the philanthropy’s future direction?

If yes, go back to Step 4 in Chapter 2 and consider the option that best fits your family. If not, you may want to consider the structural options below to address divergent interests.





Structural Solutions for Divergent Interests

If there is no consensus on whether to pursue an individualistic or collaborative model, you may want to consider structuring your giving to accommodate different preferences.

Discretionary giving is one way to accommodate both individual and collaborative aims: creating or refining discretionary giving may help to resolve an impasse. Chapter 6 offers specific suggestions for ways to use discretionary giving to address competing priorities.

If the divisions run deeper, you may want to consider more significant changes. These include:

- ❖ **Create successor funds for individual giving.** Successor funds are separate foundations or donor-advised funds (DAFs) that family members can use to pursue their own interests. They are typically created by founders for G2 family members to delineate shared family giving in the family foundation from individual giving.
- ❖ **Use a carve-out to transfer assets for personal giving.** Carve-outs involve transferring a portion of the foundation assets to a separate entity (DAF or foundation) for a family member or branch's giving. Families typically use carve-outs when a majority of family members are interested in pursuing one path but there is a resistant minority. Typically, the members who are "carved-out" no longer participate in the collective family philanthropy. For more information on this approach, see *"Breaking Up: Division in Family Philanthropy."*
- ❖ **Divide the pie.** Divisions occur when the family separates the foundation into different entities to enable different interests. This approach is common when family members cannot reach consensus on a path forward or do not have the commitment needed for effective collaboration. Divisions are typically based on family branches but can also be generational or individual. For more information on division, see *"Breaking Up: Division in Family Philanthropy."*

Keep in mind that the goal is to get unstuck and find a way to move forward. This will require compromise and compassion. These conversations can be challenging. We strongly suggest engaging a neutral, experienced advisor (along with a legal/tax professional) to help you think through the implications of the above options and to select the model that best serves your aspirations for family relationships, involvement, and continuity.

NEXT STEPS

If you have determined that there is **little interest to transition to more collaborative giving**, go to Chapter 4: Strengthening Your Individualistic Family Philanthropy, page 12.

If you have determined that there is **sufficient interest to transition to more collaborative family philanthropy**, go to Chapter 5: Designing Effective Collaborative Family Philanthropy, page 15.



4. Strengthening Your Individualistic Family Philanthropy

The research found that collaborative family philanthropy correlates to better outcomes in terms of participant satisfaction, perceptions of impact, and continuity—but that it is not the right approach for every family.

For some families, the best approach is a model of peaceful co-existence, where individuals have different domains they control within the collective family foundation. This can take different forms, including:

- ❖ Discretionary giving: Members have an established allocation that they can use to direct grants.
- ❖ Different programs reflecting different members' interests (issues or geography), with those members having primary authority for decisions in those program areas.
- ❖ Implicit quid pro quo systems, whereby members share an understanding that they will approve one another's requests so long as they are relatively proportionate and that members avoid asking for "too much."

If your family wishes to take an individualistic approach to your philanthropy, there are ways to design it to foster productive and peaceful co-existence.

Understanding Individual Influence in Your Giving

In individualistic family philanthropy, family members' priorities—the issues, places, and organizations they care about—drive giving decisions. Paramount to the success of individualistic models is the fair allocation of resources—i.e., participants understand the system by which influence is doled out, and that system is viewed as being fair.

In order to determine how to more effectively design your individualistic giving model, you first need to understand how it is currently working. The first step is to assess how decisions are currently made in your family philanthropy.

Review your family's responses to the survey questions 12 and 13 in the appendix. If the averaged score for these two questions is less than 3.5, family members perceive that funding decisions are driven by personal influence—and see some members as having more influence than others.

Next, examine how influence is allocated among family members. Refer to the grant analysis exercise in Chapter 2. Review which types of grants are most common, particularly legacy grants (Row 1), grants to organizations in which participants are personally involved (Row 3), and family-initiated grants (Row 4). Identify the family member who is associated with each type of grant request and tally the total for each member by both number of grants and by grant amounts.

Summarize these findings into a report to share with decision-makers.

Given the potentially sensitive nature of this analysis, we recommend that it be done by a staff member, a neutral consultant, or a single board member. This individual can determine how to share the information so that it can be productively received.

You can use the following questions to guide individual reflection and group discussion on these findings:

1. Are certain family members responsible for proposing and deciding on a disproportionate share of grants?
2. Why do these members have more influence? Some possible reasons:
 - » They have longer tenure with foundation
 - » They are from an older generation
 - » They contributed funds to the foundation
 - » They are seen as having expertise on relevant issues
 - » They are more involved in the family philanthropy (e.g., they hold leadership roles, are more deeply engaged)
 - » They are more involved in nonprofit organizations (volunteer, employment, board service)
 - » They are more vocal and/or have stronger opinions than others
3. Does this allocation of decision-making influence seem fair? Is it aligned with the behaviors you wish to incentivize now, and in the future (e.g., leadership in the foundation, volunteering with nonprofits, financial contribution, etc.)?
4. Is there alignment among family members on how allocation decisions are made? Why or why not?





Tips for Improving Your Family's Individualistic Giving

If family members are dissatisfied with the perceived fairness of allocation decisions, you may consider refining your model to award grants in a more evenhanded and transparent manner. Individual giving models are often predicated on systems of implicit and subjective influence, which become difficult to scale across generations. In general, the more you can make the implicit explicit and reduce subjectivity, the more likely your family can work together successfully in your individualistic giving.

Some specific guidance:

- ❖ **Name your principles:** Be clear about the values that drive your philanthropy's resource allocation. Fair does not always mean equal, so it is important that everyone understands why some people have more influence in grantmaking decisions than others. For example, if elder generations have more influence over decisions, this may be to recognize their contributions to the foundation (financial, time) and to demonstrate appreciation for their inclusion of later generations. On the other hand, if the norm is that the loudest voices drive decisions, this is likely to cause frustration and disengagement. You may want to adopt explicit decision-making criteria to lessen the subjectivity that enables this influence.
- ❖ **Avoid "individuation masquerading as collaboration:"** Many families attempt to create a shared experience by inviting members to seek funding for projects they care about from the family foundation. But a system where family members vote on grants proposed by other members without clear decision-making criteria often leads to competition, hurt feelings, and conflict. This model, which blurs individual and collective purpose, is common in early stages of family foundations but does not work well as families expand. (See the [report](#), page 32.)
- ❖ **Consider the behavior you want to incentivize:** Well-designed family philanthropies can encourage certain behaviors. For example, some families place a high value on volunteerism and so prioritize support for organizations where family members serve as volunteers. Others encourage stronger family bonds by preferencing projects in which multiple members work together. To encourage members to give their personal resources, some families require family members to match grants given by the foundation with their own personal funds to ensure that discretionary giving does not displace personal giving. As you design your individual giving strategies, consider what you hope to achieve and the likely outcomes of your approach.
- ❖ **Consider scale:** How will your giving model evolve as your family structure changes? If your family grows, will new members have access to foundation resources? How would current family members respond to sharing resources with new members? Many families adopt a collaborative model when they look down the road and realize that the family's growth presents a conundrum: They either have to significantly limit participation or start reducing individuals' shares—both of which are likely to cause conflict and/or disengagement.

As your family pursues an individualistic giving approach, you can find many resources that promote effectiveness in the [NCFP resource library](#).



5. Designing Effective Collaborative Family Philanthropy

Collaborative family philanthropy is about creating and implementing a shared vision for the family's philanthropy. In this section, we share some best practices for core elements of successful collaborative philanthropy—the system in which you operate, your strategy for giving, your governance models for effective decision-making, and considerations for next-generation engagement.

Creating an Effective Family Philanthropy System

All giving vehicles and methods, participants, purposes, and priorities across a family comprise the family philanthropy system, including members' personal contributions, DAFs, corporate giving, separate LLCs or private foundations, impact investments, and more. The ways these parts relate have a lot to do with the success of the collaborative family philanthropy: Our [research](#) (see page 26) found that personal giving outside of the family foundation helps facilitate collaboration inside of it. When family members have access to philanthropic resources outside of the foundation (through personal wealth, separate foundations or DAFs, etc.) to address their personal philanthropic priorities, they are more open to collaboration in the joint philanthropy.

Gaining a clear picture of your family's philanthropic system is vital for understanding how to build one that works for collective philanthropy. This requires clearly delineating the different spaces for individual and collaborative work, and reducing the friction that comes from competing goals.

Map Your Family's Giving

Using the table on the next page, identify:

- ❖ **The philanthropic vehicles** your family members use, such as DAFs, corporate foundations with family involvement, LLCs, impact investments, through the family office, private foundations, substantial personal giving, etc.
- ❖ **Who is involved.** List the main participants in each vehicle. If there are multiple participants but one person holds most of the authority, circle that name.
- ❖ **The primary purpose of this giving.** Is it focused on a specific topic or two, or does it support a broad range of issues?
- ❖ **Individual or collective.** Is it intended to reflect individual philanthropic priorities or to bring a group together with common priorities?
- ❖ **The approximate size** of this philanthropy (by assets or annual giving).

Don't worry about being 100-percent accurate. The goal is to develop an approximate picture of all the ways your family engages in philanthropy so that you can understand how they relate to each other—and how changes in any part of the system may impact the collective giving vehicle.



Philanthropic vehicle (add rows as needed)	Participants (circle primary authority)	Purpose	Individual or collaborative	Assets and/or annual giving amount

Reflection Questions

Using this data, consider the following questions (individually or in a group).

- ❖ To what extent are the different entities intended to foster individual or collaborative work?
- ❖ Are there individuals who are particularly active across philanthropic vehicles in your family system?
- ❖ How do the participants in these philanthropic efforts align with the participants in the collaborative family foundation? Are there members who are involved in philanthropy outside of the family foundation who do not participate in the foundation? Are there members involved in the family foundation who are not involved in efforts outside of it?
- ❖ Is the intended purpose of each vehicle served by the participants and the individual or collaborative nature of the effort?
- ❖ In what ways do the various efforts complement one another?
- ❖ Do you anticipate significant changes to the family philanthropy system going forward? What are they, and how will they likely change this picture?

A Note on Wealth Disparities

As you reflect on your family philanthropy system, consider the variations in wealth among individuals, generations, and/or family branches, and how those differences may affect the family’s philanthropy system. It is common for members with less wealth to rely more on the collective family philanthropy to fulfill their personal philanthropic goals, which can cause tension among family members. Because wealth disparities tend to increase over time, it is often easier for families to transition to a collaborative model earlier in their evolution. Other strategies to alleviate some of this tension include creating discretionary funds or separate personal giving vehicles. (See the [research report](#), page 27 for more information.)



Designing Your Family Philanthropy System

To create a family philanthropy system in ways that promote successful collective giving, consider the following lessons:

- 1. Create and celebrate different ways to be involved:** Many families value engagement and measure success as 100-percent participation in the family foundation. But as the family grows, that is not a realistic expectation. The time and interest individuals have to contribute to the foundation is likely to ebb and flow, so it can be helpful to create varied opportunities for participation (e.g., committee service, attendance at open meetings, etc.). Some family members will gravitate toward collaborative philanthropy more than others. Recognizing and celebrating the many ways that family members choose to participate, from volunteering their time to financial contributions, within and outside the family foundation, can help alleviate the sense of obligation that erodes commitment to the collective family foundation.
- 2. Create distinct personal giving vehicles:** The simplest way to clarify the collaborative purpose of the family foundation is to remove personal giving from it and create and/or define different vehicles for members' individual philanthropy, which can happen in different ways, including those listed below. (See also Chapter 4.)
 - » *The founder creates distinct vehicles for family members' personal giving:* A common model is for the founder to establish personal giving vehicles for members of the second generation, often called "successor foundations." This can occur during the founder's lifetime or may be created with gifts from their estate.
 - » *Family members establish personal giving vehicles:* Another model is for family members to establish their own personal giving vehicles later in the family's evolution, often during wealth transfers or liquidity events. This typically occurs as part of an intentional choice to shift the foundation to a collaborative model, when the philanthropy's leaders recognize the need to separate personal giving, and there are new resources available for that purpose.
 - » *Carve-out:* Another option is to carve out some resources from the family foundation and direct them to separate vehicles for personal giving. The family foundation is left intact for collaborative giving.
 - » *Establish discretionary giving within the foundation:* Discretionary giving—discussed in more detail in Chapter 6—is another way to delineate personal and collective giving.
- 3. Share support:** For families with a robust philanthropy system, it may be efficient and effective to provide centralized support for family members' philanthropy. This often takes place through the family office, operating company, or family foundation. Some larger families have separate family philanthropy services entities. The range of services can include legal, investment, human resources, information technology (IT), grant administration, philanthropic advisory services, accounting, and finance. In some families there is also a desire to coordinate individual philanthropic efforts (e.g., joining others with similar interests to co-fund, learn, and work together on projects of shared interest).



As families consider which services to share and how, they will need to consider the degree they are willing to sacrifice some degree of autonomy and privacy for the benefits of efficiency. There may be some areas where members are comfortable sharing decision-making, such as accounting, or IT—and others where they would prefer to have more control, such as selection of philanthropic advisor or investments. Family members may also have different preferences, so it can be helpful to have a menu of services with a fee model that can accommodate differential usage.

Develop an Effective Philanthropy Strategy

Collaborative family philanthropy requires a shared decision-making framework: in order to productively make decisions together, everyone has to have the same understanding of what the philanthropy does and does not support, and why. Decisions are based not on individuals' subjective ideas about what makes a good grant, but rather are based on collectively-determined focus areas, goals, strategies, and guidelines.

Developing an effective philanthropic strategy is a large topic, and beyond the scope of this guide; NCFP's primers on *Impact Strategies and Tools* and *Operations and Management* provide guidance on creating impactful giving programs. What follows are some specific suggestions for the creation of strategy in collaborative family philanthropy:

1. Establish an inclusive planning process: For all family members to buy into a new direction for collective giving—one which may no longer include their personal priorities—it is paramount that the process allows opportunities for broad participation. We recommend creating a planning committee that includes the next generation to guide the process and offering multiple avenues for family members to provide input. Take some time to consider who should be on the committee, and who should provide input into the planning process.

2. Ground strategy development in your values: Values provide a helpful framework to navigate the many decisions your family will face when developing strategy. Now is a good time to ensure you have a clearly articulated and agreed-upon set of values. NCFP's *Philanthropic Purpose* primer offers some useful guidance on how to do so.

3. Clarify the parameters of your giving: What priorities are you holding on to? What are you letting go of? Looking to the founder(s) and prior generations can be helpful to identify places and issues that can anchor the family's philanthropy going forward. Indeed, it is often the next generation—most eager to narrow the scope of the giving—that looks to the family's origins for guidance.

That being said, we caution against rigid perpetuation of the founders' philanthropy, as this limits the flexibility and ownership needed for continuity. Rather, what principles and priorities can you agree are important to the family? Are there concepts that are definitely on or off the table? This might include:

- » **Place:** Many family foundations begin by funding in the place(s) where the founders live and where the wealth was generated. Some expand this focus to include locations of importance to the growing family. The question of whether and who to focus geographically is a critical one. Our research suggests that having a geographic focus is a helpful organizing principle: participants from place-based family foundations had more favorable



experiences than their geographically dispersed peers, regardless of whether those participants lived where the foundation focused its funding. For many families, geography is a logical way to focus the philanthropy, with the goals of giving back to the place where the wealth was generated and connecting to family legacy. Is there a particular place that is important to the family?

- » **Issues:** Similarly, are there historic funding priorities that are core to your family's identity? This may be grounded in religion, family origin stories, or a longstanding commitment to causes or organizations. What are elements of the history that you want to maintain and what is open for reinterpretation?

4. Focus on learning: Learning together can be the glue that connects family members to each other and the work. By approaching strategy development with a learning lens, family members have the opportunity to understand pressing issues, wrestle with difficult questions, and come to a shared decision about the foundation's priorities. What opportunities are there to learn together as a family?

5. Get professional help: Finally, strategy development can be a labor-intensive process. You may want to engage a consultant who can shoulder the load, bring expertise in facilitation and/or specific content areas, and ensure that the process is seen as neutral and not dominated by any one member of the family. Do you have the capacity—the time and skills—to do this work on your own?

Build Effective Governance and Leadership Systems

The aim of collaborative family philanthropy is to bring the family together to define and realize a shared dream for their philanthropy—giving that is owned by the whole, rather than individuals. This requires a governance system that minimizes individual influence, provides clear and fair opportunities for participation, and emphasizes shared decision-making.

We have found (see the [research report](#), page 41) that boards of the most successful collaborative family foundations share some common characteristics:

- ❖ **They have clear roles and expectations:** Collaborative family philanthropy requires a governance system that standardizes authority. Participants' influence is based on their role, rather than personality or status in the family. As you establish a collective way of operating, it is important to develop clear expectations for board members and an explicit and fair selection process for board roles, including a method to rotate board seats among interested and qualified members (see NCFP's primer on [Governance](#)). It's also a good time to identify other places where family members can participate in the foundation outside of the board, such as committee membership or learning opportunities.
- ❖ **They distinguish governance from grantmaking:** In some collaborative models, board/family members are primarily responsible for grantmaking work. In others, that work primarily resides with professional staff members. The most successful collaborative family philanthropies separate governance from grantmaking, so that the primary function of the board is not to make grant decisions but to set the mission and strategic direction and ensure that the grantmaking is aligned with those goals. Delegating the work of grantmaking to professional staff helps avoid the tendency for family members to advocate for specific grants. Grantmaking committees composed of a broader selection of family members and/or community members can also limit individual influence.



- ❖ **They dedicate time to learning together:** As mentioned above, coming together to develop a shared understanding of, and passion for, a family's philanthropic priorities is critical for continuity. The most effective collaborative family philanthropies commit time and resources to shared learning: convening meetings with experts or peer funders, going on site visits, and dedicating time in board meetings to learn about relevant topics and discuss the implications for the work. Learning activities are also an opportune place to involve family members in the philanthropy who do not have governing roles, thus increasing commitment to the collaborative priorities.
- ❖ **They balance inclusion with selection:** For many families, the shift to a collaborative model is motivated by a desire to involve the expanding family in the philanthropy. It is tempting to throw the gates open wide to anyone who expresses any interest in participation (and even those who do not). But being overly inclusive results in frustratingly inefficient governance that ultimately diminishes engagement. As noted above, having clear expectations for board membership, a process to rotate members, and opportunities for participation that require less effort can help expand participation while ensuring that the foundation has the board it needs to effectively operate.
- ❖ **They develop Collaborative Champions:** Our research found that a critical element for the successful transition to collaborative family philanthropy was having family members who championed the effort. This was often the board chair or another member of the generation in leadership. In the most successful families, they were joined in this role by leaders from the next generation who are enthusiastic for a collaborative approach. For the senior generations who are used to the individualistic giving, the transition to a collaborative approach can come with a sense of loss: giving up influence in the community, and connections to individual organizations have been important aspects of their identity. Next-generation champions can demonstrate what is being gained: their excitement about building new relationships in the family and having a meaningful impact with more strategic giving can reward the older generations for letting go.
- ❖ **They include independent board members:** There are many reasons families choose to add nonfamily members to their governance (see NCFP's [Governance](#) primer). In collaborative family philanthropy, nonfamily members can help ensure commitment to the collaborative agenda, especially if they are selected based on their expertise and experience aligned with that agenda.

Reflection Questions

When thinking about your family foundation's governance, consider the following questions:

- ❖ Is everyone clear and aligned about the role of the board, how decisions are made, and the shared values that drive those decisions? Do decision-makers feel empowered?
- ❖ Is everyone aligned on expectations for individual board members, and are these the right expectations?



- ❖ Is everyone clear and aligned on who is eligible to hold governance roles? Is the system equitable?
- ❖ Are we clear about board roles and responsibilities when it comes to grantmaking? Is our board involved too much—or too little—in the grantmaking? Is the delineation between board and roles in grantmaking clear and appropriate? Are there redundancies we should address?
- ❖ If family members are responsible for identifying potential grantees, how do we ensure that the system does not become individualistic, with members advocating for projects aligned with their personal interests? What mechanisms can we put in place to ensure that the emphasis remains on the collaborative goals?
- ❖ What learning activities would be most valuable—and feasible—for our family philanthropy? How can we better use our time together to learn?
- ❖ Is our family too inclusive—or not inclusive enough? In what ways?
- ❖ Who in our family is a Collaborative Champion? Who in our family can effectively play this role now—and in the future?
- ❖ If we do not have nonfamily members on our board, what benefits can we see in including them? Are there any potential challenges or concerns? What sorts of outside directors might we want to include at the board table?

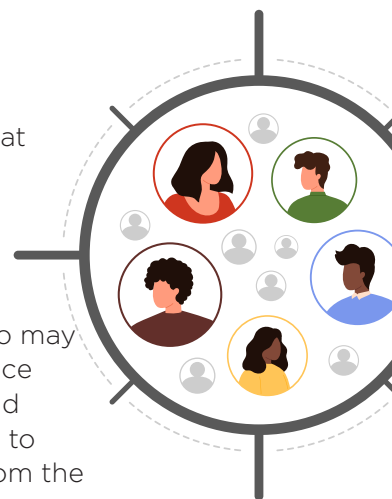
Engage the Next Generation

Many assume that collaboration becomes harder for future generations, who may share fewer common experiences, are less familiar with the founders, and face greater disparities in life stages and wealth. Yet our [research](#) (page 46) found that later generations (third generation and beyond) are more likely to want to work together than their second-generation counterparts. Their distance from the wealth creation means that they have less of a sense of ownership of the resources and are more willing to subvert their personal philanthropic interests for the sake of a collective purpose. They often see the family foundation as a chance to deepen relationships with family members across branch and generational lines, whereas earlier generations are more likely to view participation in the family philanthropy as an obligation or entitlement.

When considering how to engage the next generation in your family's philanthropy, we encourage you to do so in a manner aligned with your collaborative purpose. With the best of intentions, families often devise next-generation engagement approaches which are based on an individual model of giving, such as discretionary giving for next-generation members. This sends the message that the family foundation is a place to support one's personal passions, rather than a place to learn together and find common ground.

There are a number of ways to engage next-generation family members that will help them develop the relationships and skills necessary for collaboration (e.g., compromise, negotiation, teamwork). These include:

- ❖ Creating **next-generation funds** where members work together to develop shared funding priorities and processes. These funds work most effectively when there is a structured and supported process, with a professional or a senior family member who can help facilitate it.





- ❖ Including next-generation members in **group learning activities** related to the foundation's work—in particular, experiential activities like site visits and learning tours.
- ❖ Engaging next-generation members in **volunteer activities** related to the foundation's work.
- ❖ Integrating next-generation members into the work of the foundation through **committee or board service** (e.g., including “learner’s” seats on the board, participation in meetings, etc.).
- ❖ **Training** your rising generation on the skills and competencies they will need to be effective in the family philanthropy, such as grantmaking, communicating, and working across generations.
- ❖ **Educating** them on the history, evolution, and current work of the foundation, so that they have the necessary context and a sense of family pride that motivates engagement.

Ideally, next-generation members engage in these efforts together, so that they have opportunities to develop deeper relationships with one another and a common understanding of—and connection to—the foundation. Depending on your family's demographics, this could be implemented in age cohorts, by geography, or by interest and availability.

Reflection Questions

Below are reflection questions for considering your next-generation approach:

- ❖ What strategies have been effective in engaging our next generation? What message do those strategies send? What goal(s) are we achieving? What has worked well for our family, and why?
- ❖ What additional ways can we engage our next generation to help them understand our collaborative approach and educate them on the foundation's evolution and current priorities?
- ❖ What are the skills, characteristics, and knowledge next-generation members need to be successful in our collaborative family philanthropy? How can we help them acquire these things? What education, training, or mentorship opportunities can we provide?





6. Designing Effective Discretionary Giving

Discretionary giving is an important tool for families looking to balance individual interests and collective giving. As an individualistic outlet within collaborative family philanthropy, discretionary giving can provide a release valve for those personal projects that do not fit the collective focus. Below, we provide guidance for families who have chosen to use discretionary giving as a part of their family's collaborative philanthropy. (For the purpose of this guide we are using the term "discretionary giving" to include matching giving.)

For some context, two-thirds of family foundations offer discretionary giving.¹ There are pros and cons to discretionary giving, and we strongly encourage families to carefully consider how discretionary giving may help or hinder their family's aims. (For helpful guidance, see *"Should We Add Discretionary Giving to Our Grantmaking Strategy?"* and *"Discretionary Grants: Engaging Family... or Pandora's Box?"*) We offer the guidance below to families who already have, or are planning to develop, discretionary giving.

Understanding Your Current Discretionary Giving

Evaluating your foundation's current discretionary giving can help you make choices about how to refine it. First, gather the following data regarding your current discretionary giving:

1. Using the grant analysis table from Chapter 2, identify the percentage of your overall giving for discretionary/matching gifts.
2. Compile a list of all discretionary grants from the past three years.
3. Analyze discretionary grant use over the past three years. Where have grants been awarded? Consider geography, issue, and type of grant. Also examine use: how much has been awarded, and by whom? (Anonymize as needed.)

Summarize the findings and share them with the board, then consider the following reflection questions:

- ❖ What is surprising in this report? Does it raise questions or concerns about how discretionary grants are being used?
- ❖ What are our goals for discretionary giving? To what extent has it been successful in achieving those aims?
- ❖ Does it encourage or discourage personal giving?
- ❖ How does discretionary giving influence participation in the foundation?
- ❖ How do current discretionary giving levels relate to family members' personal giving capacity? Is this amount of giving significant relative to the philanthropy that members participate in outside of the foundation?
- ❖ If we were to continue discretionary giving in our current manner, what would be the implications in 5, 10, or 20 years?

Based on this conversation, identify things that seem to be working well and areas of concern that you'd like to address as you (re)design for the future.

¹ National Center for Family Philanthropy, *Trends 2025*, p. 39.



(Re)Designing for the Future

You now need to design, or refine, your discretionary giving. It may be helpful to convene a working group to consider the below factors and make recommendations to the board.

- ❖ **Goal:** What are the goals of your discretionary giving?
 - » Encourage participation in the foundation
 - » Incentivize personal giving or volunteerism
 - » Show appreciation for board service
 - » Provide an outlet for personal interests
 - » Other

Different goals have different design implications. If you want to recognize board service, then only board members should be eligible for discretionary grants. If you want to encourage personal contribution or volunteerism, consider matching grants (volunteer service or personal giving). Given your goals, are there any limitations or restrictions you want to place on the use of discretionary giving?

- ❖ **Mission/program alignment:** Should discretionary giving be limited to purposes aligned with the foundation's mission or programmatic priorities, or should people be able to use it to support interests outside the foundation's giving focus? There are pros and cons to either approach, but in general, we advise adopting broad guidelines and not requiring that grants fit within the foundation's programmatic priorities. This better allows discretionary giving to serve as a release valve and avoids blurring the lines between collaborative and individual giving. At the same time, you may want to identify prohibitions such as grants that you would not be comfortable supporting with foundation resources (i.e., things that may run afoul of your values or cause reputational harm to the foundation/family). And we recommend that you have a process for review and approval (e.g., by staff members, board chair, etc.) to address any discretionary grant requests that may cause concern.
- ❖ **Scale:** What proportion of the foundation's support should go toward discretionary giving? In general, we recommend the following:
 - » Limit discretionary giving to no more than 20 percent of total giving.
 - » Discretionary giving should be an acknowledgment of participants' efforts—not the reason they come to the table. Limit discretionary allocations so that they are not significant relative to personal means and are commensurate with the level of effort expected for service.
- ❖ **Eligibility:** Who gets to participate? Should discretionary giving be available to all family members or only those serving in governing roles? While each family is different, in general we recommend limiting discretionary giving to those involved in board service (which may include participation in committees). This ensures that the pool of participants expands in a sustainable way as the family grows.



- ❖ **Allocation:** Many families provide equal discretionary funding for all participants. Other families have different allocation levels. For example, some families base discretionary giving amounts on length of board service or age. Others do the opposite, offering discretionary giving only to more junior members who have fewer personal resources. There is no right answer to how families determine their allocation levels, but it is important to have a clear and principled rationale for the system.
- ❖ **Planning for the future:** Will your discretionary giving adapt to your changing family and foundation? Think about what your family will look like in the coming decades. A common challenge of discretionary giving is managing to a desired budget as the family grows over time. This discretionary creep can result in a diminished budget for collaborative giving. To address this dilemma, consider the following:
 - » Limit to members serving in governance roles.
 - » Cap the percentage of the budget that is awarded to discretionary giving and develop a simple allocation formula whereby the discretionary budget is divided among participants. This will likely result in fluctuations in individuals' annual discretionary giving allocations.
 - » Employ tiered giving levels, such that older generations have larger allocations; those higher levels are phased out as those generations stop participating.
 - » Consider a phased approach: If the foundation has been mostly individualistic, start with larger discretionary allocations to get through the transition and address resistance from members more attached to an individualistic model. Define a fixed period for this (e.g., three to five years) and be explicit about the philanthropy's plan to reduce discretionary giving over time.
 - » Use regular incremental reductions to limit growth and arrive at/maintain the desired discretionary budget.
 - » Manage expectations: Make it clear to next-generation participants that discretionary giving will not be as large for their generation as it has been for prior ones, given the realities of the family's demographics and collaborative goals.





7. Conclusion

The tension between individual and collective purpose is inherent in family philanthropy—it cannot be resolved, only managed. This tension takes different shapes at different moments in the family’s evolution, and the strategies to manage it must similarly adapt.

But it is the work of adaptation—taking stock of how things are going, learning together about new possibilities, developing the skills of compromise and negotiation, building relationships across branches and generations, grappling with hard questions and finding ways to productively resolve them—that results in continuity in family philanthropy. The glue that holds families together over time in their shared philanthropy is a willingness to evolve, and a commitment to finding common ground.

We hope that this guide has offered some practical advice for how to do that. Our ultimate aim is to help families design philanthropy that best enables them to experience the satisfaction and fulfillment that comes from working together to improve the world.

In the spirit of ongoing learning, please reach out with any input, questions, and feedback to the authors, Ashley Blanchard (Blanchard@lga.global) and Wendy Ulaszek (Ulaszek@lga.global). We wish you the best on your philanthropic journey.





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About National Center for Family Philanthropy

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

About Lansberg Gersick Advisors

Lansberg Gersick Advisors (LGA) is a trusted advisory and educational partner to owners of the world's leading family enterprises. We help families and their enterprises succeed from generation to generation. Since 1997 we have advised families on all aspects of enterprise continuity, as they face complex generational transitions. Our global team combines bespoke advice and education to support the world's leading family businesses, family offices, and family foundations. We ground our advisory work in research and thought leadership and are the originators of theories and concepts that are widely adopted throughout the family enterprise and family philanthropy fields. Learn more about LGA by visiting lga.global.



Appendix: Assessment Survey

This survey is designed to help your family foundation leaders determine two things: 1) whether your family philanthropy is currently operating in an individualistic or a collaborative manner; and 2) whether there is interest among participants in changing how you operate.

It should be completed by participants in your family philanthropy. Who takes it will be different for each family, but participants may include current family board members, family members who do not serve on the board but have an understanding of how the philanthropy operates, nonfamily board members, and staff members with an understanding of how the board operates. We suggest that family members complete the survey and send it back to one individual, who can aggregate results and produce a summary report.

Based on the NCFP's report, *Philanthropy in Complex, Multigenerational Families: Balancing Individual Preference with Collective Purpose*, we use the following definitions of individualistic and collaborative family philanthropy:

- ❖ **Individualistic family philanthropy:** Family philanthropy that is primarily intended to support the personal philanthropic interests of individual family members. Each participant has relative autonomy to support their interests through a system of “peaceful coexistence.”
- ❖ **Collaborative family philanthropy:** Family philanthropy that is primarily intended to bring the family together around a shared philanthropic agenda. This model prioritizes shared decision-making and limits individual influence. In collective family philanthropy, personal interests are addressed outside of the collaborative giving.



Section 1: Identifying your family's current approach to family philanthropy.

Below is a series of statements related to your current experience with your family's philanthropy. Please rate how much you agree with each statement on a scale of 1 to 6. Before administering the survey, be clear about who will see the individual responses. In some cases, confidentiality will not be needed; in others, it will be necessary to get accurate responses.

1 = Strongly disagree

2 = Disagree

3 = Slightly disagree

4 = Slightly agree

5 = Agree

6 = Strongly agree

1. A core purpose of our family foundation is to make a meaningful impact on critical issues.	
2. We have clearly defined funding priorities and strategies.	
3. Our giving is consistent with our collectively decided goals.	
4. We have clear grant guidelines and criteria.	
5. All participants have a shared understanding of what makes a good grant.	
6. We make decisions about grants based on their fit with our collective strategic priorities.	
7. Our funding priorities were developed through a collective planning process.	
8. We dedicate time at board meetings to learn about the issues we support.	
9. Grants are primarily identified by professionals (staff members, advisors) versus individual family members.	
10. Supporting the personal philanthropic interests of family members is not a core purpose of our foundation.	
11. The priorities of our family foundation as a whole take precedence over the personal interests of individual family members.	
12. I can honestly say that who proposes a grant does not significantly influence whether it gets funded.	
13. In general, family members have an equal voice on grant decisions.	
14. Family members are free to give personally outside of the family foundation; we focus on our collective giving goals within the family foundation.	
15. People do not rely on the foundation to support their personal philanthropic priorities.	
Total:	

Survey respondents should send completed surveys back to the leader(s), who can then aggregate results and produce a summary report for group discussion.



Scoring Guide

If the average score across surveys is:

15 to 45: Your family philanthropy currently operates with an individualistic approach. Giving is driven by the interests and preferences of family members, and the purpose is to support members' philanthropic priorities, giving more weight to personal preferences or tends to work in an individualistic way but is open to some family collaboration.

46 to 75: Your family philanthropy operates with a mixed approach that blends individual and collective giving.

76 to 90: Your family philanthropy operates in a more collaborative manner. You emphasize collective decision-making and planning processes and minimize individual influence.

In addition to looking at your total score for Section I, pay attention to the distribution of responses to each of the questions: Are there certain questions where respondents in your family foundation had significantly different answers? If so, it will be important to address those issues.

Now that you have more clarity about how you're currently operating, you can determine if you're interested in change.



Section 2: Identifying your desire for change.

Below is a series of statements related to your aspirations for your family's philanthropy in the future. Please rate how much you agree with each statement on a scale of 1 to 6.

1 = Strongly disagree

2 = Disagree

3 = Slightly disagree

4 = Slightly agree

5 = Agree

6 = Strongly agree

1. I am in favor of narrowing the focus of our giving.	
2. I would prefer to further focus our collective giving—even if it means that there are fewer resources available for the things I care most about.	
3. I'd like to scale back the amount of giving that supports individual family members' personal interests.	
4. I think that we could do a better job of ensuring that our giving reflects community needs and best practices.	
5. I would prefer to decrease our discretionary/matching giving (as a proportion of overall giving).	
6. I'd like to spend more time discussing strategic issues at board meetings.	
7. I would like to clarify our funding strategy and guidelines, so it's easier to determine when to say yes and no to a request.	
8. I'd prefer to have more substantive discussions about the issues, rather than discuss individual grant requests.	
9. I would prefer to reduce the amount of discretionary giving every member receives.	
10. I wish family members focused more on the collective giving goals of the foundation and less on their personal philanthropic priorities.	
Total:	

Survey respondents should send completed surveys back to the leader(s), who can then aggregate results and produce a summary report for group discussion.

Scoring Guide

A high score (45 to 60) indicates a desire for a more collaborative approach in the future, whereas a low score (10 to 20) indicates satisfaction with the current approach.

10 to 20: Strong preference to keep your current family foundation the same.

21 to 44: Some interest in operating in a more collaborative manner.

45 to 60: Strong preference for a more collaborative approach in the future.

Again, in addition to examining your total score for Section 2, look at the distribution of responses. Are people in agreement about their desired path forward, or are there a range of perspectives? What issues have the greatest divergence?



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