



LEGACY IN FAMILY PHILANTHROPY:

A MODERN FRAMEWORK

Family Workbook

DISCUSSION STARTERS

STORIES FROM GIVING FAMILIES

PRACTICAL MATTERS:
TIPS & STRATEGIES

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INTRODUCTION

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

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

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

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

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

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

Janice Simsohn Shaw
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I. DISCUSSION STARTERS



Questions for Reflection & Discussion

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

A Modern Framework: Legacy Levers



LEVER 1: VALUES

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



LEVER 2: INTENT

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



LEVER 3: PLACE

- ^{ER 3} What place or places do you feel most connected to in your giving, and why?
- Has this changed over the years, or do you imagine it changing in the future; is there agreement among members of your family on this question?
- What is one philanthropic gift you’ve made, small or large, that most embodies your pride of place, and why?



LEVER 4: FAMILY

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



LEVER 5: ACTION

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

LEGACY LEVERS: BIG PICTURE QUESTIONS

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

UNDERSTANDING LEGACY: STORIES FROM FAMILIES IN CHANGING TIMES

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

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

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

NEXT STEPS

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

II. UNDERSTANDING LEGACY: STORIES FROM FAMILIES IN CHANGING TIMES



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

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

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

A Generosity of Spirit: The Legacy of Black Philanthropy

Excerpt from [NCFP blog](#) by Maya Diggs.

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

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

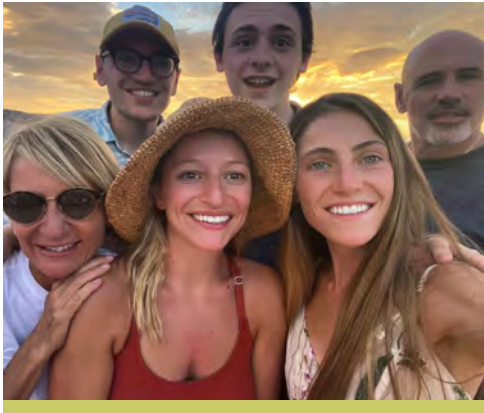
Philanthropy has long been embedded in the legacy of African Americans. Yet, Black communities are often forgotten in conversations about donors and giving. There are a variety of factors that play into why this is the case. Black families were subjected to years of slavery, segregation, and discrimination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

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

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

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

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



Gabriela Citrone and her family

Leverage, Relationships, & Commitment

Gabriela Citrone,
Outreach Director, Citrone 33

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

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

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

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

One way we’re doing so is by engaging in storytelling so we can effectively

reach people and get them involved in the work we’re doing and the problems we are trying to solve.

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

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

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



The Millerberg Family

The Heart of Giving

Amanda Millerberg

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

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

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

While the idea of our “Legacy” is still not defined, I want to be a purposeful and impactful giver—to help up, not just hand out. As we condensed our

ideas and experiences to values, we hope people will think of the Millerbergs as three things: kind, hardworking, and faithful. We often talk to our children about our family in this way—what three things does it mean to be a Millerberg. **In that way, we hope to encourage our kids to give, but not limit them to our preferences. I want to encourage their own areas of passion within these broader values.”**

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

Also, in the past we did a lot of our giving anonymously, but recently, we have changed our approach. We were at a concert once and saw a friend’s name on the list of donors. Because

of that, we were then more likely to give—and it changed our thinking. Now, we realized that putting our name on something encourages others to give. For example, we were excited about the new Junior Achievements building, so we put our name behind a major donation and that allowed us to then send our introductions to our network and further increase the support behind the program.

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



Desai Family

Doing, Learning, & Interconnecting

Lopa Desai

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

“We don’t think about giving as our legacy, we think of it as our duty.”

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

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

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

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

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

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

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

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

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



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

Kelly Nowlin, Trustee, Surdna Foundation

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

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

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

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

There is great value in understanding the story of the founder and what values and circumstances inspired them to create this philanthropic legacy. Curating and sharing this history of our Founder and the evolution of the Foundation has been an important exercise and should be

woven into all philanthropic programs that engage family in some way. This history connects us, orients new family members and can be an ongoing source of guidance and inspiration. While this story grounds our family in this work, we are fortunate in that it also empowers future generations to adapt, evolve and innovate to address the issues pertinent to current times.

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



Courtesy of the Hill-Snowdon Foundation

Power, Privilege, and Impact

Ashley Blanchard,

Trustee, Hill-Snowdon Foundation

The mission of the Hill-Snowdon Foundation (HSF) is to work with low income families and communities to create a fair and just society. HSF seeks to accomplish this mission by providing grants to organizations that work directly to build the power of low-income families; leveraging our and others' resources; and promoting opportunities for learning and growth. The Hill-Snowdon

Board includes both family and non-family members. Ashley is a fourth generation family member and trustee and works as a consultant to nonprofit organizations and foundations. Ashley was previously the founding co-chair of the Council on Foundation's Next Generation Task Force.

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

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

More broadly in our field, I’m seeing a new awareness that family philanthropy is part of an unjust, rigged system. I see a personal reckoning for family members who are forced by this moment to take action—the

sense that we should spend more, we should spend differently, etc. And you can’t bring up these questions without looking at the huge structural justice issues embedded in our system of personal wealth. People who never thought about this system ever are now thinking very differently about this. People giving COVID relief funds are applying racial equity criteria to this, which six or nine months ago would have been impossible to fathom for them.

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

“We’re doubling our payout for the next three years.”



Cofounders John and Helena Raskob

A Living Legacy

Kerry Alys Robinson,
Trustee, The Raskob Foundation

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

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

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

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

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

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

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

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



Photo by Kate Lord Photography; Courtesy of the Summit Foundation

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

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

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

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

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

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

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

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

–**John Sant**, third generation trustee

III. PRACTICAL MATTERS:

STRATEGIES, TIPS, & TOOLS FOR FAMILY ENGAGEMENT IN LEGACY



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

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

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

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

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

Meaningful Legacy Requires Making Space for Next Generation Influence

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

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

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

“My siblings and I have been involved since day one, when we were 25, 23, and 16. My dad sent out very lengthy questionnaires when starting the foundation asking what kind of

things are you interested in, locally, internationally, etc.—it was a very collaborative process. I still have those questionnaires on file somewhere!”

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

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

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

Consider this reframe shared by Kerry Serini McHugh:

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

Connecting Family Engagement to Building Legacy

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

–Elaine Martyn, Fidelity Charitable

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

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



- **Start early: invite young people to the table as thoughtful and equal contributors early and often!** NCFP and Fidelity Charitable have an abundance of resources available on

how to meaningfully engage youth in giving, and many families are doing so with great joy and success.

- **Keep the door open by offering flexibility and a multitude of ways to be involved.** This will help create space for family members to engage when and how they are able. Creating lots of different avenues for involvement and finding ways to tap into the skills and interests of family members are demonstrated strategies for successful family engagement.
- **Participate and offer site visits or “armchair site visits” (where grantees meet with your board and other interested family members, either virtually or in person).** This helps create connections to the work on the ground and shares the family’s impact and legacy for a broader swath of family members.
- **Volunteer with grantees or other nonprofit organizations.** Whether on a family trip, or in different family members’ home communities, the opportunity to roll up your sleeves together can be an educational and

enjoyable bonding experience for all generations.

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

about their own personal legacy as complementary to that of the broader family giving.

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

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

ARMCHAIR SITE VISITS: A GAME-CHANGER

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

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

–Family Foundation President

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

–Elaine Martyn, Fidelity Charitable



Fidelity Charitable has [great resources](#) available to giving families.

A few of the tools available are:

Gift4Giving eGift

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

TIPS Cards

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

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

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

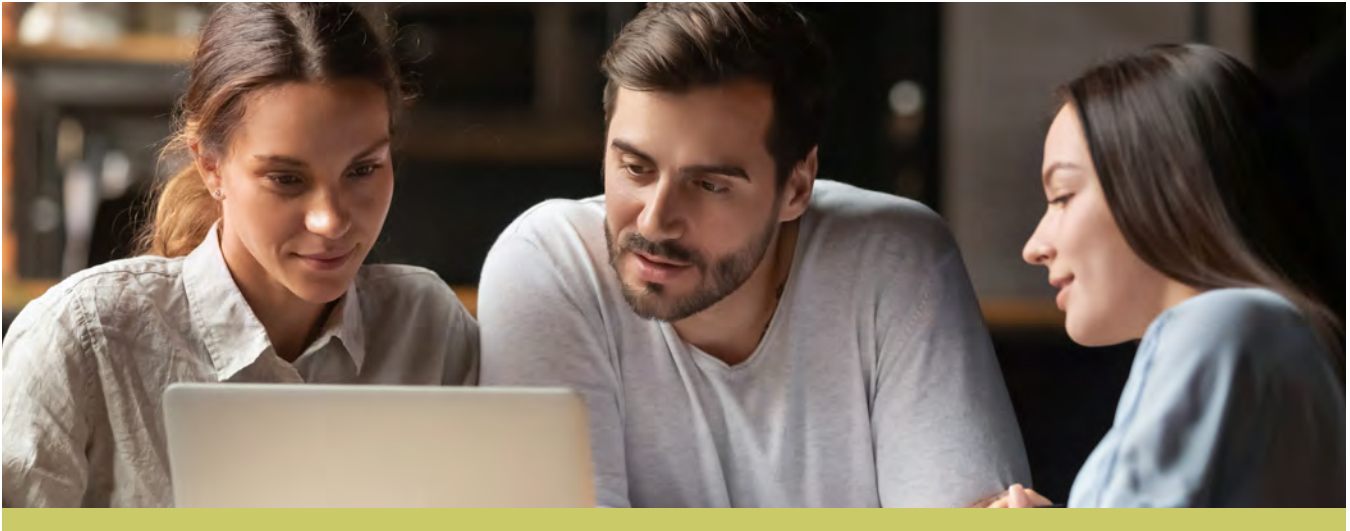
People

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

Inspiration

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

Tips & Tools for Inspiring and Effective Family Dialogue About Legacy



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

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

10 Questions to Help Start the Values Conversation



Excerpted from “[10 Questions to Help Start the Values Conversation](#)” by Suzanne Hammer, Founder of Hammer & Associates.

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

Getting clear on values will help you “talk” your walk.

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

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

About Values...ask yourselves:

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

About Family Giving...ask yourselves:

6. Why does our family exist?
7. What is the purpose of our wealth?
8. What change would we like to see in the world?
9. How would we like to be remembered?
10. What are the most important values we share in common?

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

Courageous Conversations

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

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

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

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

foundation? What does this mean, and how invested do we want to be?"

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

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



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

And of course, courageous conversations are a particularly complex beast within the context of family philanthropy, with the long

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

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

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

- Live your legacy in full view of your descendants—communicate and explain what you're doing. Share information and power from a young age. Involve your kids and others who will be asked to carry on your giving while you're living and active and provide them the chance to work together as you model your legacy.
- Try to find peace with the fact that what you think your legacy is may be interpreted differently by other family members and future generations.
- Provide very clear communications—set very clear expectations for what is going to happen when you're no longer there. For families of wealth, sometimes that means talking to your descendants about their own inheritance, and why you've chosen this chunk of your estate to go into a charitable vehicle. These can be hard conversations to have but a lot of what's important to you—your values, where you've found meaning in life, and your hopes for your family's philanthropy—will come out of those moments.

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

CREDITS

About the National Center for Family Philanthropy

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

About Fidelity Charitable

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

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Special Thanks

We express our deep gratitude to the donors and experts who agreed to contribute their perspectives and stories to this paper. NCFP also offers special thanks to Fidelity Charitable for funding this publication and being invaluable thought partners.

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