

A. REFLECT ON — YOUR FAMILY

INSTRUCTIONS

Review the questions in this activity and jot down your thoughts. You do not have to answer all the questions, but we recommend you give each topic some consideration before reaching out to your family members.

For more information on discussing philanthropy with your family, see *Additional Resources: Reflect on Your Family*.



A. REFLECT ON
— YOUR FAMILY

INSTRUCTIONS

Review the questions below and jot down your thoughts. You do not have to answer all the questions, but we recommend you give each topic some consideration before reaching out to your family members.

Family Members

Who do you consider family? Who in your family would you like to involve in your philanthropy (e.g., immediate family members, stepchildren, children’s spouses, those in the local area)?

As you list family members, note any dynamics that may surface from each person’s involvement.

Logistics and Availability

- What are your expectations about time investment from family members?
- Are in-person meetings feasible, or will some family members have to engage remotely?
- What are your expectations about how often your family will revisit philanthropic decisions (e.g., annual or semiannual meetings)?

You should ask individual family members about their availability before the first family gathering to give them an opportunity to signal their level of interest.



A. REFLECT ON

- How does your family communicate other important matters?
- How does your family communicate when in disagreement?
- How can you communicate expectations about roles and responsibilities?

It may help to brainstorm a set of communication ground rules—either by yourself or at the first family gathering—and have everyone involved agree to uphold those rules.

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Decision-making

- As the primary donor, what decisions would you prefer to make by yourself?
- What decisions could be made with family members?
- How would you like group decisions to be made (e.g., majority vote, consensus)?
- What are your family’s strengths and weaknesses when it comes to group decision-making? How can you address the weaknesses?

It can be helpful to review the Toolkit Primer in the Introduction and indicate which activities/decisions could be group decisions for your family.

B. — INTRODUCE THE NEXT GENERATION TO PHILANTHROPY

INSTRUCTIONS

Introduce the next generation (e.g., your children or grandchildren) to the significance of philanthropy and the process of giving through discussion-based reflections and interactive activities.



B. INTRODUCE THE NEXT GENERATION — TO PHILANTHROPY

INSTRUCTIONS

Below are four discussion-based reflections and interactive activities that you can complete with your children, grandchildren, or younger family members.

Reflect on Family Values

Sharing your values will help the next generation understand why you pursue philanthropy and the greater mission and vision you seek. Use your selected Value Cards and a fresh set of Value Cards from the back of the Toolkit to guide your discussion.

SUGGESTED ACTIVITY FORMAT:

1. Spread out one set of Value Cards on a table.
2. Ask children to select three to five cards that represent the values most important to them. If there are remaining blank cards from your exercise, they may want to write in other values. You can substitute sticky notes or index cards if you need more blank cards. We recommend up to five write-in cards.
3. Following their selection, share your own card selection. If you selected the same card, move those cards to a separate “Shared Values” pile.
4. For each remaining card, ask the children why they chose that value. What does that value mean to them?
5. After listening to their responses, explain your own selections. Remember that this reflection is discussion-based; there are no right or wrong answers.
6. Once you have finished, ask the children which cards they would like to add to the “Shared Values” pile.



B. INTRODUCTION TO PHILANTHROPY

Start a Conversation

We encourage you to have a conversation with your younger family members about the reasons for your previous giving. Sharing your motivations to give inspires the next generation to act philanthropically. Reflect on the following before beginning, to guide your conversation:

1. What role has giving played in your life?

2. What gifts, either given or received, have been most meaningful to you, especially as a child or young adult, and why?

SUGGESTED ACTIVITY FORMAT:

Discussing your philanthropy and its meaning with younger family members can be straightforward. If you are looking for prompts, consider the following:

1. Share your giving history with a particular organization. Ask if they know why you have chosen to support this organization.
2. Share an anecdote about how your life has been affected by a certain organization or issue.
3. Share a story about how someone helped you in a meaningful way or how you received help from an organization.

B. INTRODUCE THE NEXT GENERATION — TO PHILANTHROPY

Set Up a “Giving Allowance”

Learning by doing provides motivation and experience for the next generation to engage philanthropically. This activity teaches children how to handle charitable donations and demonstrates thoughtfulness and intention in the decision-making process.

First, set up a “giving allowance”—an amount that you feel would be age-appropriate. You can set an allowance per individual or ask the children to come to a consensus.

Determine how often you want to do this activity (e.g., monthly, biannually, annually, etc.). Some families choose to do this during the holiday season, on days of recognition (e.g., Earth Day, Veterans Day), or on birthdays. Use EPLI Issue Cards and EPLI Budget Coins from the back of the toolkit to guide your discussion.

SUGGESTED ACTIVITY FORMAT:

1. Spread out the Issue Cards on a table. You may choose to omit any issues that will not resonate or are not age-appropriate. Use the write-in cards to add issues, if desired. If you need additional write-in cards, you can substitute sticky notes or index cards.
2. Ask the children to select up to three issues that are important to them.
3. Review the backs of the selected cards together and circle any specific focus areas of interest (e.g., special education, cancer), or write-in focus areas that are not listed.
4. Once the issues have been selected, brainstorm organizations in your community or area that have connections to the chosen issues. Older children can do Internet research independently. For younger children, you can research online together or ask if their school raises funds for specific organizations.
5. Ask the children to decide on the amount to donate to each issue from their giving allowance. It may help to use the EPLI Budget Coins. For younger age groups, writing in the amount (e.g., \$25, \$100) may be easier to understand than percentages. Use the write-in coins (or sticky notes) to guide the decision-making process.
6. Decide together how you would like to make the donation (e.g., through an online pledge, by check, by contacting the organization, etc.).



EPLI PHILANTHROPY PLANNER

INVOLVING FAMILY SUMMARY

Now that you have completed this module, turn to the Involving Family Summary on the next page. Identify the family members you would like to involve in your philanthropy and outline each family member's contribution in an engagement plan. Tear out the summary to include in your Philanthropy Planner at the end of the toolkit.



INVOLVING FAMILY SUMMARY

INSTRUCTIONS

List the individuals that you would like to involve in your philanthropy.

- _____
- _____
- _____
- _____
- _____

INSTRUCTIONS

Based on the names you have listed above, consider a role, and strengths and concerns with involving this person in your philanthropy.

<i>Example</i>	
NAME <i>Martha</i>	ROLE(S) <i>Thought Partner</i>
STRENGTHS How would this person help me meet my philanthropic goals? <i>Knows organizations in the local community. Shares my values and interests</i>	CONCERNS Why might you hesitate to involve this person? <i>Maybe busy with other projects</i>
List the topics you would like to discuss with this person: <i>Recommendations for education organizations</i>	Action steps to move forward: <i>Will ask next lunch</i>



FAMILY MEMBER 1	
NAME	ROLE(S)
<p>STRENGTHS How would this person help me meet my philanthropic goals?</p>	<p>CONCERNS Why might you hesitate to involve this person?</p>
<p>List the topics you would like to discuss with this person:</p>	<p>Action steps to move forward:</p>

FAMILY MEMBER 2	
NAME	ROLE(S)
<p>STRENGTHS How would this person help me meet my philanthropic goals?</p>	<p>CONCERNS Why might you hesitate to involve this person?</p>
<p>List the topics you would like to discuss with this person:</p>	<p>Action steps to move forward:</p>



FAMILY MEMBER 3	
NAME	ROLE(S)
<p>STRENGTHS How would this person help me meet my philanthropic goals?</p>	<p>CONCERNS Why might you hesitate to involve this person?</p>
<p>List the topics you would like to discuss with this person:</p>	<p>Action steps to move forward:</p>

FAMILY MEMBER 4	
NAME	ROLE(S)
<p>STRENGTHS How would this person help me meet my philanthropic goals?</p>	<p>CONCERNS Why might you hesitate to involve this person?</p>
<p>List the topics you would like to discuss with this person:</p>	<p>Action steps to move forward:</p>



FAMILY MEMBER 5	
NAME	ROLE(S)
<p>STRENGTHS How would this person help me meet my philanthropic goals?</p>	<p>CONCERNS Why might you hesitate to involve this person?</p>
<p>List the topics you would like to discuss with this person:</p>	<p>Action steps to move forward:</p>

FAMILY MEMBER 6	
NAME	ROLE(S)
<p>STRENGTHS How would this person help me meet my philanthropic goals?</p>	<p>CONCERNS Why might you hesitate to involve this person?</p>
<p>List the topics you would like to discuss with this person:</p>	<p>Action steps to move forward:</p>

