

SECTION 3

HOW DO YOU INVOLVE YOUR FAMILY?



3. INVOLVING FAMILY

For many donors, philanthropy presents a unique opportunity to include family—however you may define it—and create a family legacy. You may include family members in helping develop philanthropic goals, providing feedback, or carrying out your philanthropic mission.

This section guides you through the following steps:

- 1** **Involve your family in your philanthropy** to create and embrace shared family values and create a meaningful legacy.
- 2** **Navigate family dynamics** through a series of reflection activities.
- 3** **Involve the next generations** (children and grandchildren) to encourage and support their philanthropy.

3.1

INVOLVE YOUR FAMILY IN YOUR PHILANTHROPY

Involving your family can take multiple forms, from involving them in decision making to preparing for eventual succession. Before engaging your family, it can be helpful to outline the forms of involvement you wish to consider. It is useful to be clear about your expectations for various family members' roles and to seek their buy-in.

ACTIVITIES

- G** Reflect on Your Family
- H** Navigating Family Dynamics

G

ACTIVITY REFLECT ON YOUR FAMILY

INSTRUCTIONS

Review the questions in Activity G 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: Section 3** at the end of this toolkit.



WORKSHEET
REFLECT ON YOUR FAMILY

INSTRUCTIONS
Review the questions below and jot down your thoughts. You may also wish to discuss your ideas with trusted peers or advisors to understand your options before reaching out to your family members.

FAMILY MEMBERS

Whom 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)?

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- How do you think about your philanthropic identity? Is it a continuation of the legacy between your parents and older family members or are you forging a new legacy?
- Does your philanthropic vision take you well into the future or is it something you would want to revisit periodically to fit changing circumstances in the world?
- How would you feel about the next generation playing a role?
- How do your children see how they want to give back to the world? If they are young, how do you want to engage them in thinking about these issues, if at all?
- How do you feel about spouses being involved?
- Are you interested in designing various tiers of participation and ways to incentivize active participation and leadership?
- What values inform your giving and that of your family? Have you crafted a vision and mission statement? Would you want to involve your family in this process?
- Would you prefer to spend down all of your philanthropic assets in your lifetime, or to set up a philanthropic vehicle that outlives you and exists in perpetuity? If you prefer a perpetual giving entity, how and when will you hand over the reins? In the future would you prefer it to be managed by your family members, trusted non-family advisors, or some combination?
- Are you concerned that including your children could have too much influence on their ambition or life paths? If so, why? What are some personal parameters or guard rails you have about engaging your children in philanthropy? Have you shared those with your children?



WORKSHEET
REFLECT ON YOUR FAMILY

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 for 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.

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COMMUNICATION

- 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 at the first family gathering, and have everyone involved agree to uphold those rules.

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UNDERSTAND THE DIFFERENT ROLES FAMILY MEMBERS CAN PLAY

Here is a list of some roles that family members can play in your philanthropy. One person can play multiple roles. As you go through this list, think about which roles meet your current needs and the family members who might be able to fill those roles. If you feel some uncertainty engaging family members, consider having a conversation to ask their thoughts about giving back or invite them to volunteer together.

1. **CO-PHILANTHROPIST:** I want this person to be my partner in philanthropy, to help me set my priorities, to be a sounding board, and to be involved throughout the process.
2. **IMPLEMENTER:** I want this person to help me research how and where to give and help me implement my philanthropic goals.
3. **THOUGHT PARTNER OR ADVISOR:** I want this person to give me feedback on my philanthropic goals and plans for achieving them.
4. **SUCCESSOR:** I want this person to continue bestowing my philanthropic assets after my passing.
5. **OTHER:** Add your own reasons for wanting to include this person.

You will allocate these roles to your family members at the end of this section, in the Engaging Family Summary.



WORKSHEET
NAVIGATING FAMILY DYNAMICS

INSTRUCTIONS
Invite each family member to go through Activity A and Activity B in Section 1: Finding Your Focus Areas, or Activity I in this section.

After each family member has gone through the values and issues exercises individually:

1. Identify shared values or points of alignment across the family.
2. Invite each family member to share why these values are meaningful to them. This process of personal sharing may help you find additional points of alignment and connection.
3. Similarly, identify points of alignment across issue areas. This may require you to think broadly.
Examples: If several family members are interested in charter schools while others are interested in affirmative action advocacy, you might identify education as a shared interest. If entrepreneurship is a shared interest, some family members may want to start a national social entrepreneurship fellowship for college students while other family members may want to support a nonprofit helping women from an under-resourced local community to start their own businesses.
4. Once again, have each family member share why those issues are particularly meaningful to them and discuss what resonates across the family.

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INVOLVE THE NEXT GENERATION

Involving the next generation is often of great importance to donors. Philanthropy is an opportunity to bring family together around a common goal, communicate values across generations, and develop a sense of social responsibility in the next generation. Having discussions about giving back helps ground the next generation's understanding of social responsibility to carry out family activities, such as a day of service, site visits, and on-going volunteering. This section suggests possible ways to introduce the next generation to philanthropy.

For more information on engaging the next generation, see **Additional Resources: Section 3** at the end of this toolkit.

ACTIVITY

I Introduce the Next Generation to Philanthropy



ACTIVITY

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.



WORKSHEET
**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 other 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 the extra deck of Value Cards from the back of the toolkit to guide your discussion.

SUGGESTED ACTIVITY FORMAT
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- Spread out one set of Value Cards on a table.
- 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 having up to five write-in cards.
- Following the children's selection, share your own choices. If you and they selected any of the same cards, move those cards to a separate "Shared Values" pile.
- For each remaining card, ask the children why they chose that value. What does that value mean to them?
- After listening to their responses, explain your own selections. Remember that this reflection is discussion-based; there are no right or wrong answers.
- Once done, ask the children which cards they would like to add to the "Shared Values" pile.



WORKSHEET
**INTRODUCE THE NEXT GENERATION
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?

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

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WORKSHEET

**INTRODUCE THE NEXT GENERATION
TO PHILANTHROPY**

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

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

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. Then, follow the instructions on the following page.

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



WORKSHEET

**INTRODUCE THE NEXT GENERATION
TO PHILANTHROPY**

SUGGESTED ACTIVITY FORMAT
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- 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.
- Ask the children to select up to three issues that are important to them.
- 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.
- Once the issues have been selected, brainstorm organizations in your community or area that have connections to them. Older children can do Internet research independently. For younger children, you can research online together or ask whether their school raises funds for specific organizations.
- Ask the children to decide on the amount to donate to each issue from their giving allowance. It may help to use the Budget Coins. For younger age groups, using 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.
- Decide together how you would like to make the donation (e.g., through an online pledge, by check, by contacting the organization).

EPLI PHILANTHROPY PLANNER

INVOLVING FAMILY SUMMARY

Now that you have completed Section 3, turn to the Involving Family Summary on the next page. Identify the family members you would like to engage 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.

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EPLI PHILANTHROPY PLANNER
INVOLVING FAMILY SUMMARY

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

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INSTRUCTIONS
 For each name you have listed above, consider what role you want them to have. Also think about their strengths and any concerns you have with involving this person in your philanthropy.

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

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

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

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

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

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

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