

# THE NEXT GENERATION of Catholic Philanthropists

INSPIRATION AND IDEAS FOR ENGAGEMENT



FADICA

FOUNDATIONS AND DONORS INTERESTED IN CATHOLIC ACTIVITIES



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# Table of Contents

<b>Introduction: A Call to Action</b>	<b>1</b>
<b>The Unique Gift of Catholic Philanthropy</b>	<b>2</b>
<b>Top Ten Themes: Effective Next Generation Engagement in Catholic Philanthropy</b>	<b>8</b>
<b>Engagement Models and Ideas in Action</b>	<b>31</b>
<b>I.A. O’Shaughnessy Foundation</b>	<b>31</b>
<b>Conrad N. Hilton Foundation</b>	<b>36</b>
<b>The Raskob Foundation for Catholic Activities, Inc.</b>	<b>41</b>
<b>GHR Foundation</b>	<b>44</b>
<b>Jewish and Protestant Philanthropy</b>	<b>46</b>
<b>Conclusion</b>	<b>55</b>
<b>Resources</b>	<b>56</b>
<b>Appendix</b>	<b>57</b>
<b>Acknowledgments</b>	<b>58</b>



# Introduction: A Call to Action

There has never been a more exciting time to engage the next generation in the vital work of philanthropy. In 2014, the world saw the youngest person ever, at just 29 years old, top *The Chronicle of Philanthropy's* list of the fifty most generous donors.<sup>1</sup> Young people will inherit and create trillions in wealth in their lifetime, and nextgendonors.org predicts that much of that wealth will be designated to charitable giving.<sup>2</sup> These factors, as well as initiatives such as the Bill and Melinda Gates and Warren Buffet Giving Pledge, have led to what has been called the new golden age of philanthropy.

Moreover, it is an exceptional time for engaging young Catholics in philanthropy. Today, Catholic philanthropy finds itself at the intersection of three present-day phenomena: the golden age of philanthropy, the Pope Francis effect, and the emergence of the largest generational cohort since the baby boomers, the millennial generation.

Almost daily, Pope Francis inspires the faith and actions of his twenty-one million followers through social media, making his message accessible—especially among younger Catholics—and earning him the title “The Tweetable Pope.”<sup>3</sup> Pope Francis has motivated giving among Catholics. FADICA’s 2014 nationwide survey found that more than three quarters of Catholic adults who increased giving in 2013 noted the influence of Pope Francis.

This publication was created in response to requests from FADICA members interested in examples of

how other families and foundations were engaging younger generations in philanthropy. Our hope is that it provides these examples, along with practical tips and tools. We have tried to be as specific as possible in our profiles, including details of how and when these foundations have engaged younger generations. Most of all, we hope that these stories offer inspiration to take action.

Every foundation and leader involved in this work will agree that cross-generational work, family dynamics, and generational succession can be among the most challenging aspects of philanthropy. Those who have taken a proactive approach, however, emphasize that benefits have included enhanced family or group dynamics, improved grantmaking, provided peace of mind for the founder or current leadership, and cultivated confidence around long-term mission success. We hope that this publication will be a useful resource for current leaders as they consider and develop their own engagement strategies.

We want to remind readers that there is no such thing as perfection. As with any significant matter of faith and family, nobody else can tell another the right answer for a particular family or foundation. Faith and wisdom that comes from others offer useful resources, but only you can discern what the best course of action is for your family’s unique circumstances. Despite the challenges, the effort is worthwhile and offers exponential return on any investment of time, attention, and effort.

<sup>1</sup> Donovan, D., Gose, B., & Di Mento, M. (2014, February). Gifts Surge from Rich U.S. Donors. *The Chronicle of Philanthropy*.

<sup>2</sup> Northwestern Mutual Voice. (2014, December). A New Golden Age of Philanthropy: What’s Driving Next-Gen Giving? *Forbes Magazine*.

<sup>3</sup> O’Loughlin, M. J. (2015). *The Tweetable Pope*. Harper Collins: New York.

# The Unique Gift of Catholic Philanthropy

**W**hat makes Catholic philanthropy different? How might one distinguish Catholic and Catholic-inspired philanthropy from other faith-based or secular philanthropic practices?

While an entire book could (and should) be written on these questions, two particular things uniquely inspire Catholic giving: the gospel tradition and values, including Catholic social teaching; and the Church, the community of believers who evidence faith, hope, and love in their daily lives.

Brought to life through a commitment and response to the gospel message are the ministries, congregations, religious communities, and institutions that comprise the global Catholic Church. Likewise, it is through the Church—its sacramental life, mission, and diverse apostolates—that the gospel message and its values are shared, taught, and put into action.

As we witness increasing violence and diverse threats to human life and the planet, the capacity of the Catholic Church to put its values into action to support human flourishing has never been more important. And Catholic philanthropy in particular, inspired by these values and committed to the Church's capacity, is as vital as ever.

The inspiration of faith also leads to an amazing reality: every day the Catholic Church feeds, houses, clothes, cares for, and educates more people than most any other institution on the planet.<sup>4</sup>

As Executive Vice President for Catholic Relief Services Joan Rosenhauer puts it, “The Catholic community is everywhere and everyone. We are in every country,

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*“The Catholic community is everywhere and everyone. We are in every country, every corner of the world, including some of the most isolated, remote areas helping people in need where no one else is present. And we are everyone—rich and poor, urban and rural, of every race and background, the powerful and the powerless. We have more potential than almost any other group to build a more just and peaceful world.”*

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Connecting to the inspiration and values that fuel Catholic philanthropy, and highlighting the Church's capacity and impact is essential to engaging the next generation of Catholic philanthropists.

<sup>4</sup> Kelly, M. (2011). *Rediscover Advent*. St. Anthony Messenger Press: Cincinnati, Ohio.

<sup>5</sup> Conference at Catholic University of America, 2016.

## Connecting the Next Generation to Catholic Philanthropy

To understand how Catholic philanthropy can be meaningful to younger generations, it is also critical to consider how young people currently engage in charitable giving.

In *Next Gen Donors: Respecting Legacy, Revolutionizing Philanthropy*, the organization 21/64 (profiled on page 49)<sup>6</sup> found that the next generation of major donors describe their philanthropy in four key ways, as:

1. committed to values over valuables;
2. focused on impact over recognition;
3. eager for relationships and hands-on engagement;
4. and interested in actively crafting their philanthropic identities through personal, authentic experiences.

Given this emphasis on values by next generation philanthropists, it is all the more important to bring to light the values that uniquely inspire Catholic philanthropy. Far from a “lifeless set of rules and regulations” as Matthew Kelly observes in *Rediscover Advent*, values are at the heart of what it means to be Catholic. And our Catholic values articulate a vision of human flourishing that depends on authentic encounter and relationships of solidarity—which likewise are top priorities for young donors.

Consider how Pope Francis’ message and example speaks to all generations, and especially to younger people. The Holy Father puts Jesus’ words into action through direct human encounter: comforting the afflicted, visiting prisoners, and welcoming the stranger. These expressions of love in action connect directly to what young donors identify as essential.

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## Scripture and Catholic Values—Compassion and a Preferential Option for the Poor


Both the Hebrew and Christian Scriptures consistently echo and affirm God’s special concern for the vulnerable: the widow and the orphan, the migrant, the sick, and the poor. Not only that, they speak to today’s challenges and orient practical responses that serve the vulnerable.

In a 40th anniversary message to FADICA from the Secretariat of State of the Holy See delivered by the Apostolic Nuncio, the Secretariat transmitted a greeting from Pope Francis that referred to the preferential option for the poor and spoke to the unique focus of Catholic philanthropy. Encouraging members to discern the ever-changing needs of the Catholic community and broader society, Pope Francis asked FADICA to be particularly attentive to the needs of the poor and those on the peripheries of society, as he evoked words from *The Joy of the Gospel*: “for each individual Christian and every community is called to be an instrument of God for the liberation and promotion of the poor...”

Maureen O’Connell observes in *Compassion: Loving our Neighbor in an Age of Globalization* that “the Gospels are filled with accounts of Jesus’ emotional encounters with the poor and afflicted, and the physical example of Jesus’ healing ministry is central.”<sup>7</sup> Jesus’ healing actions often restored people to the community from which

<sup>6</sup> 21/64 and Johnson Center for Philanthropy (2013). *Next Gen Donors: Respecting Legacy, Revolutionizing Philanthropy*. Retrieved from: nextgendonors.org.

<sup>7</sup> O’Connell, M. (2009). *Compassion: Loving our Neighbor in an Age of Globalization*. Orbis Books: Ossining, NY.



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they were previously excluded due to social or cultural attitudes toward a physical ailment. Jesus reconnected these individuals to community through physical healing, but also through personal encounter, despite rules that suggested contact with such people was forbidden. Think of the leper in Matthew chapter 8 or the bleeding woman in Mark chapter 5.

Loving our neighbor lies at the heart of the Bible, and two other powerful gospel touchstones articulate this radical value of love for neighbor, particularly the vulnerable and marginalized neighbor.

In the timeless Good Samaritan parable, Jesus describes the call to love God and our neighbor as ourselves as the greatest commandment. When a lawyer asked for more detail, “Who is my neighbor?” Jesus tells the story of a Samaritan who finds and aids a man beaten by the roadside (Luke 10: 25-37). A priest and a Levite had already passed and ignored the man, but the Samaritan, a foreigner, bandaged the man’s wounds, and took him to an inn for care.

“Which of these three do you think was a neighbor to the man who fell into the hands of robbers?” Jesus asks. The lawyer replied, “The one who had mercy on him,” to which Jesus responds, “Go and do likewise.”

As Catholic Christians, we are called to “go and do likewise”: to love radically and identify everyone as our neighbor, especially people on the margins of society. Jesus challenges us not only to help those like us, but to help the other as well.

Finally and perhaps most importantly, in the well-known gospel passage Matthew 25, Jesus does not just help or heal the sick and hungry. He completely identifies with them. “For I was hungry and you gave me food, I was thirsty and you gave me drink, I was a stranger and you welcomed me... Truly, I say to you, as you did it to one of the least of these my brethren, you did it to me.” (Matthew 25: 35-37, 40). Thus Jesus’ call to serve the suffering is equated with serving and loving God, and is at the heart of Catholic ministries around the globe.

### **Catholic Social Teaching—Human Dignity and the Common Good**

Often referred to as one of the “best-kept secrets of the Church,”<sup>8</sup> Catholic social teaching articulates the Church’s commitment and response to critical social issues of the day.

With roots in the Old Testament and in Jesus’ ministry, the modern Catholic social tradition is based on official Church letters or encyclicals that began with Pope Leo XIII’s 1891 encyclical *Rerum Novarum, On the Conditions of Labor*. This first encyclical addressed the challenges of the industrial revolution and the condition and rights of workers. The Catholic social tradition is a living, breathing tradition, with the most recent encyclical issued by Pope Francis in 2015, *Laudato Si, On Care for Our Common Home*. The document, addressed to all persons, encompasses environmental degradation, climate change, and a call for action.

Because of its broad scope, the Catholic social tradition is often distilled into a more manageable listing of key values or principles. The list can vary from seven to ten principles, depending on who is compiling it. The following list begins with the fundamental value of the inviolable dignity of human life and of every human person, and ends with the commitment to peace:

<sup>8</sup> Deberri, E. P., Hug, J. E., Henriot, P. J. & Schultheis, M. J. (2003). *Catholic Social Teaching: Our Best Kept Secret*. Orbis Books: Ossining, NY.



- The dignity of the human person
- The common good
- Solidarity
- Subsidiarity
- The preferential option for the poor
- The dignity of work and the rights of workers
- Rights, responsibilities, and participation
- Universal destination of goods
- Stewardship of God’s creation
- Peace

Catholics believe that every person is created in the image of God and that each individual is holy and sacred. As a result, the life and dignity of each person at every stage of life is the foundation of a moral society. Therefore, the principle of the common good includes everyone. As St. Thomas Aquinas noted, the dignity and well-being of the individual is integrally connected to the dignity and well-being of our neighbors and the broader community: “He that seeks the good of many, seeks in consequence his own good.”<sup>9</sup> Or in the words of St. John XXIII, the common good is “the sum total of conditions of social living, whereby persons are enabled more fully and readily to achieve their own perfection.”<sup>10</sup>

The themes of the major documents of the modern Catholic social tradition convey the range of global social realities and public challenges it encompasses: the arms race and its defiance of peace, the sacred gift of human life and threats to life, the challenge of consumerism, workers’ rights and responsibilities including a living wage, the widening gap between rich and poor nations, underdevelopment, the effects of urbanization, and the political responsibility of lay Catholics, to name a few.<sup>11</sup>

The Catholic social tradition encourages Catholics to engage the problems of the world in new and creative ways. As it calls on us to help improve society as part of our spiritual journey, the Church’s social tradition

and our faith are far from disconnected to the pressing issues of our day— or from the top concerns of the next generation.

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### **Intergenerational Solidarity: Lasting Impact and Solutions**

One of the leading trends among younger philanthropists found in 21/64’s study is a focus on results, solutions, and strategy. Another survey discovered the same finding internationally: sixty-nine percent of high net worth individuals placed a premium on seeing results, women and younger philanthropists especially.<sup>12</sup>

As a global institution, the Catholic Church has a rich history and record of impact and innovation. Catholic religious and lay people have been changing the world as active witnesses to the gospel, in innovative and entrepreneurial ways, before the term “social innovation” was coined. For centuries, Catholic religious and lay people have launched networks of Catholic schools, hospitals, and social enterprises to help communities flourish and serve people on the margins.

More recently, Catholic sisters have launched solar energy “tech cafes” in Africa for example, while Jesuits

<sup>9</sup> Aquinas, St. Thomas (1917). *Summa Theologica*.

<sup>10</sup> Pope John XXIII (1961). *Mater Et Magistra*.


<sup>11</sup> Massaro, T., SJ (2005). From industrialization to globalization: Church and social ministry In K. M. Weigert & A.K. Kelley (Eds), *Catholic Social Tradition: Cases and Commentary*. Rowman & Littlefield: Lanham, MD.

<sup>12</sup> 21/64 and Johnson Center at Grand Valley State University (2013). *Next Gen Donors: Respecting Legacy, Revolutionizing Philanthropy*.

are taking their education network digital to reach refugees around the world in one of the worst humanitarian crises since World War II. Religious and lay Catholics have identified unaddressed needs or injustices, developed sustainable responses, and creatively disrupted the conditions that led to the problem in the first place.

A snapshot of the Catholic organizational footprint in the United States alone shows both the impact and potential to donors interested in human flourishing and development. Speaking to FADICA members in 2016, Dr. Susan Raymond of Changing Our World summed up that footprint. She noted that 630 Catholic hospitals manage twenty million emergency room visits per year, especially in rural and marginalized communities, and that Catholic Charities agencies serve almost ten million people per year. Internationally, Catholic Relief Services and the Caritas Internationalis network are among the largest and most effective relief and development networks in the world.<sup>13</sup>

Younger generations of donors also cite a greater interest in causes and issue-based giving,<sup>14</sup> and recent research indicates their trust in and opinion of institutions has grown more negative in the past five years.<sup>15</sup>



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In this context, Pope Francis' visible uniting of causes and institution is compelling. He has engaged the Church's brick-and-mortar institutions in his focus on human trafficking and homelessness, showing the value of institutions in responding to the refugee crisis or in protecting the environment. And he does so in a way that taps into the personal spirituality that sustains the individuals serving and those being served in these institutions—by highlighting the sacred nature of their work.

When Pope Francis visited the Greek island of Lesbos and brought home with him several Syrian refugee families, he modeled the power of institutions to facilitate real change.

The Catholic Church's rich social tradition, strong fabric of institutions, and ample opportunities to change the world are not the only attractions of a uniquely Catholic philanthropic approach for young people today. One of the most compelling is the personal transformation that can happen through human encounter, by accompanying people on the margins.

This pastoral approach of accompaniment has a rich theological and pedagogical foundation in the Church, and again can connect to young donors' prioritization of authentic relationships and encounter. In school, students who undergo such experiences are called experiential learners. For the donors of the future, we might refer to them as the "experiential donors."

The good news is that the Church's teachings and institutions offer strong frameworks and a wealth of theological underpinnings to make this a meaningful and transformative experience.

FADICA has experienced this transformative power in its own program for young philanthropists. FADICA's Philanthropy Leadership Intern Program (described on

<sup>13</sup> Changing Our World & Campden Research in London and PNB Paribas. In *Helping Goodness Spread: FADICA's National Symposium Proceedings*.

<sup>14</sup> 21/64 and Johnson Center for Philanthropy (2013). *Next Gen Donors: Respecting Legacy, Revolutionizing Philanthropy*. Retrieved from: [nextgendonors.org](http://nextgendonors.org).

<sup>15</sup> Fingerhut, H. (2016). Millennials' views of news media, religious organizations grow more negative. *Pew Research Center*. Retrieved from: [pewresearch.org](http://pewresearch.org).

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page 26) has shed light on the sometimes hidden but transformational power of Catholic tradition and practice.

As one intern put it, "My internship offered many occasions to speak with and learn from experts in philanthropy, including FADICA members. I felt constantly inspired when these chances arose, particularly during the research phase of the [Ebola Crisis and Response] white paper project, when I spoke with numerous courageous Catholics working to protect some of the world's most vulnerable people."

Catholic philanthropy is a crucial link in advancing the Church's mission and programs. It also provides an exciting pathway for the next generation of Catholic philanthropic leaders to connect to their faith tradition, its spiritual resources, and to their own identified philanthropic values. It creates opportunities to explore and build on those values over a lifetime, and to connect to a community of people putting those shared values into action throughout the world as part of a global community: the Catholic Church. By sharing Catholic values in ways that are explicit and tangible, we can create a relevant and meaningful connection for the next generation of Catholic philanthropic leaders to a life-giving and world-opening Catholic spirituality of giving.

“Once we start to think about the kind of world we are leaving to future generations, we look at things differently; we realize that the world is a gift which we have freely received and must share with others.... Intergenerational solidarity is not optional, but rather a basic question of justice, since the world we have received also belongs to those who will follow us.”

- Pope Francis, *Laudato Si*

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# Effective Next Generation Engagement in Catholic Philanthropy

Ten key themes emerged from a survey of the general body of research on next generation engagement, the experiences of subject matter experts, and interviews with FADICA members. Drawing also on lessons from family business succession, family philanthropy, and psychology, we present these insights and highlight how various FADICA members have been approaching cultivation of the next generation in their philanthropy. These themes incorporate the unique aspects of engaging the next generation in Catholic philanthropy in particular, as reflected in the attention to Catholic values and tradition as well as in Catholic philanthropic vignettes and shared experiences. This summary is followed by more extended reflections on each lesson learned. It is important to note that this list, like much of generational engagement, is a work in progress. It is also not organized in any particular priority order.

**1 Formation over time, not a one-time workshop**  
You cannot learn philanthropic leadership in one workshop. Those who are finding success in training and education think of it as “formation,” with eighteen-month to two-year programs with curricula, hands-on experiences, and opportunities for peer-to-peer learning.

**2 Mentoring from trusted adults can be transformative**  
Often admired adults can help young adults develop skills, uncover their passion, and engage more fully. In family philanthropy, guidance and personal mentoring from aunts and uncles, older cousins, or other trusted adults can be very powerful—their voices, even when saying the same thing, may be heard differently than a parent’s.

**3 The earlier the better**  
Philanthropic families have found that cultivating generosity is most effective when it is a lifelong lesson. The opportunity to develop philanthropic leadership begins as soon as children are learning to share, and continues through the psychological development of teens and young adults. Inspiring youth and young adults leads to longer term engagement with philanthropy and the Church.

**4 Hands-on experiences are critical learning methods for millennials and young people**  
Site visits, guest speakers, or mission trips to engage with grantees can make philanthropy and Catholic values come alive for younger generations. Hands-on experiences are invaluable opportunities to expose young people to the breadth and work of the Catholic Church, values in action, and principles of effective philanthropy.



**5** **Next gen engagement can inspire current leadership**

Cross-generational interaction strengthens current leaders and helps to put focus on the foundation's mission. It may prevent internal conflict to focus on the next generation. Focusing on the rising generations—and less on individual positions—broadens the vision of the future.

**6** **Nonfamily board members can help strengthen family philanthropy**

Engaging outside experts and trusted leaders in board service can enhance the discourse and commitment among family members.

**7** **Affinity and working groups offer great opportunities for learning and growing**

Many young people can be inspired and engaged through affinity groups and networking opportunities, whether or not they are actively or formally involved in the family foundation.

**8** **Peers are powerful**

Younger staff and peers at foundations, within Church organizations, and in nonprofits can provide opportunities for joint learning and friendship that will last for years to come.

**9** **Realistic expectations are key**

Schedules and time commitments must be accessible for young people who might be starting careers, families, or are still in school. Evenings and weekends are often more accessible to young people. A long-term view is important for understanding the subtle impact of change in families over decades.

**10** **Real authority is irreplaceable**

Hands-on experiences through which young people have real authority and decision making over clearly defined matters is critical and among the most important lessons in next generation engagement. Authentic authority is a key way, and possibly the essential way, that people develop the skills of leadership. A specific project, a separate next generation grantmaking fund, board positions, and matching or discretionary grants (even if small) have provided meaningful experiences of giving and strengthen younger generations' interest and commitment.

## 1

# Formation over Time

Many of the most effective foundations recognize that **becoming a philanthropic leader takes time**. Smart philanthropy is not something that can be learned in a one-time workshop or by reading a book. Like spiritual formation, it requires a thoughtful process over time that includes different kinds of intellectual learning, practical applications, and reflection on development with supportive role models and more experienced leaders.

Foundations that are intentionally engaged and successful at involving younger generations approach training and education as a “formation” process, with eighteen-month to two-year programs that can include curricula, hands-on experiences, and opportunities for peer-to-peer learning.

The process of understanding and synthesizing family values and culture, legal, financial, and public accountability requirements, Catholic values and social teaching, and best practices in philanthropy can easily overwhelm anyone. Competence, not to mention excellence, involves intellectual understanding,

emotional and spiritual maturity, and sound judgement that require learning, patience, and most importantly practice.

Expecting people to learn how to be effective in too short a time period can create any number of unforeseen consequences. For example, the likelihood that grantmaking will not be at its highest level or that potentially serious mistakes will be made, is almost guaranteed if a leadership transition happens suddenly. In cases where board members are unprepared for board roles or leadership, there can be significant costs to the individuals and overall family harmony. Preparing the board, future board members, and future leaders over time is a critical way to advance your mission and to invest in future excellence and impact.

## Passing on Values

One type of preparation includes explicitly passing on values. Just as values are learned and developed over a lifetime, so to the transmission of values takes time. Any effective approach to passing on values requires a

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### TAKING THE LONG VIEW

A leading Catholic foundation and FADICA member shared its struggle to prepare next generation leaders for potential board service within the constraints of a highly focused grantmaking program. With a desire that every dollar possible be directed to impact impoverished communities, the foundation has been hesitant to allocate money for trustee education and related expenditures for non-trustees. Driven by a culture of simplicity, humility, and a cost-efficient ethos, the foundation has instead taken a long view of cultivating the leadership capacity of younger family members by encouraging them to volunteer, participate in internships, and become involved with nonprofits and organizations

with which the foundation has deep relationships. This approach has helped the next generation learn more about the issues and realities of the nonprofit sector, and develop an appreciation for the complexity of extreme poverty and geopolitical issues.

While next generation members are volunteering and engaging with nonprofits, they are also encouraged to prioritize development of their own professional careers. With over thirty people in the family’s third generation and with varying wealth levels among the family branches, this foundation’s approach highlights the importance of helping young people develop an appreciation for the value of a dollar. In turn, this helps future board members to understand how far each dollar can go in impacting impoverished communities, especially internationally.

multipronged approach, starting with a parent's own example, and with consistency over many years.

Young people must also understand why their elders have made the choices they have made, process the choices they could make, and develop an understanding of how these values impact their lives. It is unlikely that their school (even Catholic schools) or religious education programs will fully convey the values most important to a family's philanthropy. To ensure that the next generation will carry on a philanthropic legacy, it is essential to engage with the younger generation about the family's core values and how they drive a family's philanthropy.

As you will see from the experience of The Raskob Foundation, GHR Foundation, and other foundations profiled in this publication, supporting shared experiences for teenagers and young adults over time can shape dynamic leaders who are prepared for significant responsibility in their twenties and thirties. The I.A. O'Shaughnessy Foundation, also profiled in the next section, has designed an extensive eighteen-month training program for prospective board members. Whether through a formal program or informal approach, these efforts are inspired by the understanding that formation over time is critical to developing next generation leadership.

## VALUES ACROSS DIFFERENT GENERATIONS

Older generations can struggle with passing on Catholic values and principles to younger generations who sometimes feel alienated or out of step with the Church. Such differences are not unique to your family or foundation. In these cases, three things may be helpful to consider:

- If you are feeling particularly sensitive about a difference of opinion, it may be that you are closer in values than you imagined. It may actually be easier to understand someone with very different values. Greater conflict may arise between people who share highly similar values but prioritize them differently.
- It may be helpful to better understand differences by framing them generationally. For example, family members from the WWII generation, also known as the Greatest Generation, value loyalty and obedience. Millennials and younger generations may resist dogma and want to challenge, question, and adapt the rules.
- Learning together with younger family members about the Church's diverse and global ministries, and the rich Catholic social tradition—a unique resource among faith traditions—can engage young people where they are. Research indicates that young people are more compelled by causes than institutions. The Church's campaigns to end global poverty, hunger, and human trafficking are vital causes being addressed through Church institutions.



# Sisters of Charity Foundation of Cleveland

SUSTAINING MISSION AND VALUES IN THE FACE OF CHANGE

Some of the most thoughtful next generation engagement occurs in foundations established by religious communities. **Sisters of Charity Foundation of Cleveland** carries forward the mission of the Saint Ann Foundation, which was created more than forty years ago as the nation's first health care conversion foundation, and first grantmaking foundation established by Catholic sisters.

Today, the Foundation offers many lessons for effective intergenerational engagement that are relevant beyond religious communities. Due to demographic shifts and other macro-economic factors, the sisters have had to think deeply about how to sustain their mission and values in the face of change. With aging and fewer sisters to carry forward the work, they have been leaders in fostering vibrant lay collaboration.

While collaboration, like any deep value, can sound easy in the abstract, it is incredibly difficult. One of the great gifts the sisters' experience offers is the importance of identifying the essence of their spirituality and mission, and communicating it to others. In order to engage lay people as full partners in fulfilling their mission, they have had to communicate and pass on their values and charism—in addition to living them. Risk-taking, selflessness, faith, and perseverance are among the values and qualities that have enabled the sisters to offer decades of life-giving ministry. The process of teaching lay leaders, especially through storytelling, has been critical to the Foundation's success in upholding and sustaining its mission and Catholic identity. The sisters have worked thoughtfully and diligently to instill in lay partners what makes the Foundation and their approach to grantmaking unique with a discipline from which all philanthropists can learn.





# 2 Mentoring

**W**hile parents and grandparents are critical to the formation of young people, **mentoring by other trusted adults can be invaluable**, especially during teen and young adult years. Trusted adults can serve as transformative mentors especially during “differentiation,” the period of time in which teens or young adults test the limits of their own individuality and embrace some degree of distinctiveness from their nuclear family. Parents can provide safe and controlled ways for children to reflect on their values during this period of growth. This important parental milestone involves some “letting go” so that children can more fully appreciate parents as they become adults themselves.

Aunts, uncles, and older cousins can be natural mentors who also share history and deep love for the young person. These mentors can often say the same thing that a parent or grandparent might say, but the young person may hear it differently. Supporting strong relationships with siblings and cousins can make it more likely a young person will connect with a mentor among the extended family.

The thoughtful choice of nonfamily board members can also offer important opportunities for connecting to mentors with issue-area expertise, national, or international stature, and perspectives that few young people are exposed to at young ages. (For more on this, see Nonfamily Board Members on page 21).

Cultivating relationships with teachers, pastors, religious sisters, nonprofit leaders, artists, or other trusted adults, and being intentional about including them in family gatherings over the years, can again offer greater opportunities for a young person to choose among the trusted leaders you have exposed them to over time.

Providing or encouraging opportunities for children or grandchildren to come to know leaders and advocates, both within and outside the Church, on such critical issues of our time as education, poverty, and human trafficking can also enhance their worldview and their capacity to excel in school, work, and life.

Helene O’Neil Shere, who leads the W. O’Neil Foundation, values mentoring and takes connecting young people to leaders seriously. Taking a very active interest in young individuals’ pathways within philanthropy, Helene helps up-and-coming leaders find internships, connect with experts, and engage with experienced professionals. The Raskob Foundation (profiled on page 41) has formalized a mentoring program through which young people choose a mentor during their first three years of apprentice membership.

There are practical ways to ensure that mentors for children are safe and respect healthy physical, psychological, and emotional boundaries. Many dioceses have developed resources for this, given the sex abuse crisis in the Church. In addition, the best practice website [mentoring.org](http://mentoring.org) is an excellent resource (see the Resources on page 56 for more resources on child protection).

Connecting young leaders within your sphere of influence with mentors—or being one yourself—and encouraging young people to cultivate these relationships, can create a meaningful and lasting impact on their lives and careers.

# Mary J. Donnelly Foundation

## MENTORS ACROSS EXTENDED FAMILY

Elizabeth Anne Donnelly, Trustee of **Mary J. Donnelly Foundation**, provides an example of how profound an influence extended family can have on young people. She expresses a deep gratitude for the love and understated mentorship of her beloved aunt and godmother, the late Ruth Donnelly Egler. Growing up in a very close family with her aunt's family only ten blocks away, Donnelly was influenced by Aunt Ruth's example of balancing care of her eleven children with energetic community engagement, clearly animated and nourished by her Catholic faith.

"Growing up observing my parents and Aunt Ruth, it was just natural that of course you would be contributing your time and gifts to your schools, church, and other organizations." At the same time, one family member faced a prolonged serious illness. As Betty Anne says about her extended family, "We don't sweat the small stuff. We definitely have a culture of low-key getting things done with humor and support for each other."

Her aunt's mentorship has had a lasting impact on Betty Anne, who along with other Foundation Trustees is helping to chart new initiatives at the Foundation while continuing to honor the first and second generation Trustees' particular passions and way of proceeding together. The Trustees recently revised the Foundation's mission statement to include working to advance the role of women in the Catholic Church. They also wrote and distributed a history of the Foundation so that younger family members might have a better sense of the quiet generosity of those who have gone before, and encourage the former to think about ways the Foundation might address twenty-first century challenges. The Trustees actively encourage younger family members to submit grant requests.

With a family diverse in degrees of Church engagement and political perspectives, the Trustees seek to honor their family values and culture in a way that undoubtedly would make Aunt Ruth very proud.



## 3

## The Earlier the Better

**E**ngaging and inspiring the next generation at an early age can make it easier to pass on values, and to cultivate leadership and generosity. As noted earlier, formation takes time. It can begin as soon as children are learning to share, and the opportunity to engage continues through the psychological development of teens and young adults.

Many of our interviewees and experts believe that inspiring youth and young adults early also leads to longer-term engagement with philanthropy and the Church. Kerry Robinson of the Raskob Foundation for Catholic Activities recalls the blessings of growing up surrounded by extraordinary leaders in faith and nonprofit leadership. Participating in site visits and attending Board meetings and conferences as a young person infused and shaped her worldview with a love of these kind, generous, and faith-filled leaders. She says, “If you’re able to inspire the young adult psyche, they are so much more likely to stick with philanthropy and the Church.”

Structured engagement before college is a promising time to connect to youthful idealism. During college years and the first few years of professional work, finding the time given scheduling demands can be a challenge. However, if you are able to spark or connect with the passions of young adults in that time period, their schedules are likely to be no more difficult than the current board’s schedules (see more in Realistic Expectations on page 27).

Determining the best way to involve your family is a personal choice and depends upon many factors. At whatever age you begin, there are many resources to explore regarding age appropriate engagement. The Resources section offers relevant publications for exploring these strategies in greater detail.

#### Individual-Driven and Matching Grant Programs

The foundations profiled in this publication also offer examples of unique and successful strategies that stimulate the philanthropic spirit among younger generations. The Doty Family Foundation and the Conrad N. Hilton

## Doty Family Foundation

### ENCOURAGING INVOLVEMENT AT A YOUNG AGE

The **Doty Family Foundation** was created by Marie J. and George E. Doty to support charitable organizations and to encourage the generosity of the family’s five children. Now well into the third generation, the Foundation has clearly achieved its founders’ goals, with more than twenty active family members giving to over 100 charities in 2015.

A key factor in this success has been the Foundation’s triple match model. The Foundation provides a triple match to family members’ contributions of \$50 and above (for example, a \$250 contribution becomes \$1,000), as long as the donation is made to a 501(c)(3) nonprofit organization and does not conflict with Catholic Church teachings. As a result, as family

members graduate from high school and college, many have begun participating in the family’s philanthropy, with those in their twenties and thirties becoming increasingly active.

George Doty encouraged his children to become involved in the charities and organizations they support. Today, the family continues to encourage involvement, through board service or volunteerism, and younger generations usually start with their alma maters, their churches, and the schools their children attend. Several members of the family have become leaders in their communities and in groups like FADICA.

The Foundation operates on minimal organizational structure while the family carries on an unspoken culture of humility, simplicity and core family values that would make the founders proud.

## Helpful Tips for Matching Grant Programs

**Legal and fiduciary issues:** The board is the legally responsible entity and any grants recommended or proposed by non-board members must be approved and vetted by the board. Non-board family members should not be seen as receiving a “benefit” from their relationship to the foundation.

**Strategic impact:** Individually driven grants may limit the potential of the foundation’s larger mission and overall strategic impact. If the majority of grantmaking is driven by individual priorities rather than a shared mission, participants’ experience may also be less rewarding. Several strategies can be utilized to limit these risks:

- Develop a shared mission that the board fully supports.
- Limit individually directed grants to a smaller percentage of the overall grantmaking portfolio.
- Allow for individual recommendations consistent with the foundation’s mission, and/or create small group grantmaking opportunities, such as allocating funds for a junior board to direct as a collective group.
- Encourage individual family members to research, learn, and perform due diligence on prospective grantees as part of the foundation’s general grantmaking.

In addition to these strategies, developing the capacity of prospective board members to make collective philanthropic decisions also contributes to healthy succession and board development over time.

Foundation have created matching grant or member-driven grant programs for younger members. The Welk Foundation (profiled on page 29) involves children from age four to fourteen in fun and age appropriate activities. As early as age four, family members’ charitable gifts can be matched by the foundation. Typically, these contributions of five or ten dollars will be matched by as much as \$100. The Donnelly Foundation (profiled on page 14) has encouraged grandchildren to propose grants typically ranging from \$1,000 to \$5,000 for the board to consider. The Gathering

### EARLY IMMERSION IN CATHOLIC PHILANTHROPY

KERRY ROBINSON

**Kerry Robinson**, founding executive director and global ambassador of Leadership Roundtable, says that her leadership and service today were shaped by the earliest memories of being immersed in the world of philanthropy and the global Church. She recalls being “dazzled by the faith and example of moral heroes and heroines” as she came to know Catholic leaders while traveling with her father to Board meetings, site visits, FADICA meetings, and other conferences. “These inspiring leaders—ordained, religious, and lay—were often witness to the worst that humankind can do to one other, but they evinced a palpable sense of joy ... their ministry was full of purpose.”

An author and frequent speaker on faith, development, and philanthropy, Kerry has held numerous board and leadership roles in Catholic nonprofits. She also credits friendships that were developed twenty years ago with other young women in their twenties at FADICA meetings. These relationships planted seeds that continue to come to fruition, particularly in her work regarding the engagement and leadership of women in the Church. As many in the Church turn to seek the trusted counsel of leaders like Kerry, her experiences as a teen can be seen creating ripples that are serving the global Church today.

(profiled on page 51) organizes special children’s programs that are both fun and educational, allowing parents to attend board meetings and educational programming.

Finding the right size and structure for programs like these depends on each family’s and each foundation’s unique circumstances. One similarity among all those interviewed was an emphasis to begin early. No one expressed any regret about starting too soon. The overwhelming consensus regarding next generation engagement was: the earlier the better.

## 4

## Hands-on Experiences

**F**ADICA members interviewed for this resource affirmed what other research indicates as well, that **hands-on experiences are a critical way of learning for their younger family members.** This kind of experience is a clear value and expectation among millennials and young people today. In the rapid-fire, interactive, and dynamic world in which they have grown up, the idea of sitting in a lecture or workshop being “talked to” for a half day or even an hour is not ideal.

The next generation’s orientation toward information and their capacity to check, verify, or Google anything for validity is more fluid and fast-paced than the environment experienced by previous generations. The orientation to like, share, and process information with peers across geography further differentiates millennials from generations that have higher boundaries around privacy, confidentiality, and information-sharing circles.

## The Loyola Foundation

### A DIVERSITY OF DIRECT ENCOUNTERS

Members of **The Loyola Foundation** recall hosting a board meeting and a site visit in Puerto Rico, where the Foundation has a long-standing history of serving the educational, physical, and spiritual needs of communities on the island. The trip was an eye-opening experience for the great grandchildren of the Foundation’s founder, A. G. McCarthy, Jr. These next generation family members grew in appreciation of the many things they took for granted at home, and furthered their understanding for the concrete legacy of which they were a part. In Puerto Rico they saw a small sample of the many overseas schools, churches, and organizations that the Foundation’s small seed grants had helped support.

In addition to a hands-on experience in the field, the Loyola Foundation organized a symposium on the Church in Latin America and invited nontrustee family members to audit the Board meeting. The experiment led to next generation family members indicating a definite interest in future involvement with the work of the Loyola Foundation.

Mission trips are a valued asset to next generation engagement. In 2002, two of the founder’s great-

grandchildren, Alex Pratt and Kady Carr, joined next generation members of other foundations on a mission trip to Africa organized by FADICA.

The Foundation’s Executive Director, A. Gregory McCarthy IV, can also attest to the impact mission trips have had on his family. Recently, McCarthy took his daughter along with another family on a day trip to Tijuana, Mexico, where the Loyola Foundation had previously made a grant to the Oblate San Eugenio Mission for assistance with the acquisition of a school bus to transport area children with special needs back and forth from their homes to the mission. While in Tijuana, McCarthy and his daughter witnessed and served at the Oblate’s Mission.

Carrying out hands-on volunteerism, observing, and experiencing the local culture, and accompanying the Oblate priests in their mission work, McCarthy and his daughter were deeply impacted, and the mission trip helped to educate his daughter about responsible Catholic philanthropy. McCarthy says, “As we travelled back to the United States, we reflected on the wide-ranging and informative day we had just experienced. We had seen life and death; we had witnessed a baptism as well as the administration of last rites. ... My family and I left with a greater understanding of the many services offered there, as well as their intrinsic value to the local Catholic community.”

Many of the trustees we interviewed credit their passion for philanthropy to their service experiences. In the early 1990s, MGR Foundation Board Member Michael Rauenhorst worked for almost five years with Jesuit Refugee Service in Thailand. “It changed my life, and made me realize that I could do something to help other people.” Michael administered food, health, and education programs to seventy-two thousands refugees in twenty-nine camps in remote jungle locations, but says he received far more than he gave. “I received far more in terms of being accepted as a fellow human being by people who had nothing to give except the spiritual gifts of acceptance and sharing their humanity. The less people had, the more gracious of spirit they were.”

Jesuit Refugee Service shaped Michael Rauenhorst’s perspective and approach to philanthropy. “It seems to me that philanthropy requires compassion. In my experience, if you give with compassion, you receive in return a recognition of your humanity. The act of giving with compassion humanizes all of us.”

Some foundations have developed extensive site visit programs and other learning tours to enable young members to witness the needs and opportunity for philanthropic impact. One example is Mustard Seed Foundation (profiled on page 52), which utilizes an urban plunge program to expose its younger generation to critical urban needs and solutions. Young family members that take advantage of the urban plunge live in suburbs and attend relatively privileged schools compared to the realities in urban communities. By witnessing the ways pastors and organizations are meeting people with unconditional love in the face of issues like poverty, substance abuse, or homelessness, the participants of urban plunges are challenged and inspired to engage their sense of justice and their worldview.

## GENERATIONAL MOTIVATIONS FOR GIVING

It may be easy to look at young people today seemingly attached to their phones—texting, tweeting and snapchatting—and be struck by how different they are from one’s own generational experience. Research on these differences has illuminated some of the unique outlooks and characteristics of various generations, particularly within Western culture. Understanding common trends among people of different generations can help to discern shared values across generations, and can help identify opportunities to connect among family members. For a closer look at how generational personalities affect philanthropy, the article *Motivations for Giving* by Sharna Goldseker provides valuable insight.

The Hilton Foundation’s Generations in Giving Retreat (profiled on page 36) provides hands-on service connected to a grantmaking area in which all family members are invited to participate. Other foundations such as the Raskob Foundation on (profiled on page 41) and the Loyola Foundation (profiled on page 17) encourage next generation family members to join board members and/or staff on site visits to see organizations’ work firsthand.

Amid the fast pace of change and ubiquitous technology that define young people’s reality, hands-on experiences offer a powerful way for them to connect and learn. These experiences can also bring Catholic values to life in a meaningful way for the next generation. The growth of volunteerism, immersion trips, and service opportunities demonstrate that young people are responding to the opportunity to experience values in action, the Church’s ministries, and principles of effective philanthropy. These diverse types of hand-on experiences provide opportunities to capture the attention and enthusiasm of young people.

## 5

# Next Gen Engagement Can Inspire Leadership

A number of experts agree and several FADICA members shared that when foundations engage the family's third generation or beyond, a sense of freedom, creativity, and joy often emerges. **Foundations that focus on future generations can awaken new possibilities and potential.**

One foundation board member suggested that their founder's original outlook to always engage the next generation enabled them to avoid or reduce conflicts. The foundation's focus on encouraging and cultivating new leadership helped reduce our human tendency for competition or rivalries among nuclear family (e.g., siblings) and fostered more openness to extended family (e.g., nieces and nephews).

Families actively focused on cultivating leadership among third and fourth generations and beyond also build an openness to change and often create a wider perspective. While beneficial, this approach is not without its challenges. For example, an adult child can assume for years that a rule or decision (e.g., a funding limitation) will never change, only to find that a grandchild's experience opens the foundation leadership to new

possibilities, almost effortlessly. However, if family members are able to focus on mission and let go of ego ("I have been saying that for years!"), it is possible to rally around new strategies brought about by the third and fourth generations. It may even be possible to see the ways one's advocacy over the years has indeed shaped consciousness of parents or even the young person who helped bring about the current change.

The Raskob Foundation (profiled on page 41) exemplifies the benefits each generation receives when younger generations are engaged. Former leaders of the foundation who served as officers, members of the executive committees, and chairs of grants committees exude enthusiasm and passion for the work of the Foundation and are still active and supportive of the current generation of leaders.

These cross-generational interactions can strengthen current leaders and help put focus on the foundation's mission. If a foundation is focused on the future and excited about the next generation, the passing on process can be enlivening. Meaningful engagement with third and fourth generations can open new worlds for all involved.

## Key Take-Aways

The transformative power of cross-generational and extended family relationships is rewarding but complex. Here are some take-aways to consider:

- Cross-generational change is almost always slow, rarely linear, and often happens when least expected.
- Grandchildren and extended family can often help open greater possibilities in ourselves and in the family system.
- Tapping into patience and a long-term view can help families connect to the joy that comes with the potential of the cross-generational dynamic.
- A sense of humor is helpful. Being able to laugh at the irony and twists of fate that come amid the joys and struggles of a family is part and parcel of the blessing of being a member of a family.

## THE UNIQUE CONNECTION OF GRANDPARENTS AND GRANDCHILDREN

If you have ever seen a grandparent light up interacting with a grandchild, you know the power of cross-generational engagement. There is something transformative that happens among grandparents and grandchildren that awakens new possibilities for both. A stern parent can become a playful and relaxed grandparent, and a child who has meaningful engagement with grandparents can have their world opened exponentially. The same can be said of aunts and uncles who have a unique connection with their nieces and nephews. Being able to talk to the younger generation about their dreams sparks energy and provides opportunities to open doors to new growth and revitalization.



## 6

# Nonfamily Board Members

**I**n a somewhat counterintuitive way, nonfamily board members can help strengthen family philanthropy by enhancing the unique family identity of a family's philanthropy. Sometimes those born into a particular family may not fully appreciate what makes their family unique. As it applies to grantmaking and philanthropy, such clarity about values and the choice to serve those values can make nonfamily board members effective participants in family philanthropy.

While most family foundations do not have nonfamily board members, having outside experts and trusted leaders can help elevate the level of dialogue, respect, and commitment among family members. If a foundation decides not to include nonfamily board members, the foundation can benefit from the gifts of nonfamily members by involving them on staff or as issue-area experts, legal and fiduciary advisors, philanthropic consultants, or spiritual advisors.

## The Loyola Foundation

### BENEFITS OF NONFAMILY BOARD MEMBERSHIP

**The Loyola Foundation** is one of the oldest Catholic foundations in the United States that has included nonfamily member trustees from the beginning. Established in 1957 by Albert G. McCarthy, Jr. and his family, the Loyola Foundation's original board consisted of the founder, his two children, two clergy members, and two independent trustees. To this day, Loyola has continued Albert McCarthy's vision to have a mixed board of half family and half independent members. There has always been a clergy member and almost always a Jesuit trustee.

"The outside expertise and perspective is a long-standing tradition since the Foundation was incorporated, and it has been an invaluable addition to the Loyola Foundation," says Executive Director A. Gregory McCarthy IV. "The Jesuit presence, for example, helps to maintain a spirit of Ignatian spirituality that we otherwise would not have."

The Loyola Foundation's esteemed list of well-known Catholic clergy who have served on the board is notable, including Rev. William J. Byron, S.J., Theodore E. Cardinal McCarrick, and Rev. James Keller, M.M. Another notable

foundation leader was Rev. William J. Mulcahy, S.J., who was in many respects the Foundation's "conscience." The Foundation established the William J. Mulcahy, S.J. Scholarship Fund at St. Peter's University.

Third generation family member Trustee Andrea Hattler Bramson shared how having such preeminent Catholic leaders impacted her as a young trustee.

"Having non-family members allows the dynamic of the gathering to be more diverse," says Andrea. "We have subject matter experts who add their insight and suggestions with confidence."

Most impactful for Andrea was Rev. Victor Yanitelli, S.J. who was President of St. Peter's University in Jersey City. "He was always an inspiration—joyous, brilliant, and inclusive at all levels." Andrea also remembers the energy and knowledge brought to The Loyola Foundation by Patricia A. Dean, the first woman to serve as Deputy Clerk for the Supreme Court. "I am grateful for their contributions and the contributions of all our non-family trustees."

Andrea Hattler Bramson and Gregory McCarthy's impressive level of service and thoughtfulness in approaching Catholic leadership is a testament to the influence of these dynamic nonfamily members.

Positively involving nonfamily leaders and experts can influence the next generations as well. When a young trustee is sitting across the table from a nationally renowned expert or an internationally admired theologian, their experience and likely participation will be different from that of a family-only setting.

The experience of the Loyola Foundation described in this section speaks to this phenomenon.

Nonfamily involvement and outside leaders at the boardroom table can inspire a new family dynamic. Siblings and sometimes cousins often continue to see each other the same way they did when they were playmates and sometimes antagonists. They can treat each other in ways that would not be acceptable if directed toward nonfamily colleagues (e.g., a sister might snap at a brother, an older sibling might sigh or roll her eyes), and such patterns can continue throughout life. Nonfamily trustees, free from these patterns, can help shift the perception of family members. When family members see their siblings, cousins, or children professionally interacting with other leaders, it often changes the way they interact with that family member.

Despite, or maybe at times because of, the deep love within families, family members sometimes expect more from their fellow family members or do not give them the benefit of the doubt. These patterns can allow them to miss the full potential of the expertise in the family and undermine next generation cultivation. Nonfamily member board members can sometimes help families recognize and utilize the full potential of each member in service of a foundation's philanthropic mission.

## THE ROLE OF SPOUSES

The decision to involve successive generations' spouses or limit involvement to only lineal family members is a source of much concern to many families, and there are many reasons spouses are not included in formal ways in family foundations. Often there are, however, several compelling considerations for including spouses in a family's philanthropy and in cross-generational engagement:

Similar to the ways that third generation family members and nonfamily board members can unlock potential, spouses can offer human, intellectual, and spiritual capital. On a practical level, spouses often have influence over what the third generation will or will not be involved in.

In some cases, spouses can be champions and advocates for elements of family identity that may be overlooked by biological family members, just as a spouse might be more likely to ask for and write down a cherished family recipe taken for granted by family members.

# Affinity and Working Groups

**A**ffinity and working groups provide valuable opportunities and communities for learning and growing. For new foundations or for funders considering new issue areas or making an operational change, **affinity and working groups can offer a network of peers and access to research and experts.** For both learning about how to better engage younger generations, and for support after you have involved younger generations, affinity and working groups are invaluable resources for enhancing strategic impact.

Peer and networking groups provide effective ways to invite and involve next generation leaders who may not yet be board members, or who may be new board members or staff. Learning from people who have different or more extensive experience with relevant issues can be both informative and reassuring when branching into a new role or funding priority.

FADICA itself is an affinity group for Catholic philanthropists with specific interests in the vitality of the Church and its role in society. FADICA facilitates shared interest affinity and working groups within its network, as all generations increasingly embrace impact through joint learning and collaboration. Through these working groups, FADICA's national network of diverse Catholic foundations and donors come together around issues of common interest, share best practices, network, and work on joint projects. FADICA currently hosts four working groups: anti-human trafficking, Catholic schools, Church vitality, and international philanthropy. Certain issues, like human trafficking and modern slavery, have been flash points for young people looking to organize and make a difference.

FADICA's working groups enable focused collaboration on critical issues and create opportunities for cross-generational learning. For example, FADICA's anti-trafficking affinity group supported two Vatican Anti-Trafficking Symposia<sup>16</sup> for young leaders against modern slavery from around the world, including a next generation FADICA member. Leaders in Catholic philanthropy like Maureen O'Leary have worked to connect FADICA members with both longtime advocates and new leaders who bring different perspectives.

Affinity and working groups offer compelling opportunities for growth and learning in a variety of contexts. For longtime trustees and philanthropic leaders, these groups can reignite new passions and interests. Foundations with little or no staff find they can increase capacity. For those new to a foundation role, affinity and working groups can provide orientation, a network, and even training in the field.

With so much to learn, and with issues constantly changing, these groups can be effective sounding boards and sources of support for the patience and action needed to sustain long-term impactful work. In light of the importance of peers emphasized in the next section, affinity and working groups are a powerful and significant way to inspire and capture the attention of younger people.

<sup>16</sup> *Youth against Human Trafficking* (2014) and *Human Trafficking: Real Love Chases Away Fear, Greed and Slavery: Young Leaders Must Pave the Way* (2015).

### CHRISTINE HEALEY

**Christine Healey**, one of the second generation leaders of the Healey Philanthropic Group, had a steep learning curve when her father asked her to help him with his philanthropy. Affinity and working groups have been a core element of Christine's success in building a high-impact organization at the Healey Education Foundation.

After initially tracking and cataloging her father's current and historical giving, she sought out others through groups like the Council of New Jersey Grantmakers, an affinity group that was focused on Camden, New Jersey, and networked with the Campbell Soup Foundation and other longtime and significant philanthropic investors in the same schools and neighborhoods as the Healey Education Foundation.

The most significant affinity group for Christine, however, was the one she started in the early stages of the Foundation's development. She gathered investors in urban Catholic education from around the country

at a hotel in Cherry Hill, New Jersey, concluding with a special dinner at her father's farm. They shared their knowledge, experience, and approaches to investing in different models and built a network for moral support that still exists to this day. "The gathering was the most helpful thing we could have done," explains Christine. "It formed our thinking and became our network over the years."

This was important both programmatically and emotionally, as at times this kind of work can be isolating for next generation family members in such a unique position and, for Christine, a shift from her previous professional career.

In addition to having developed a high-impact funding strategy for her foundation, she cochaired the FADICA Catholic Schools Working Group and has organized an informal and growing group of women who are serving as stewards of their father's legacies.

## 8

## Peers are Powerful

Peers are one of the most powerful influences, after parents and nuclear family, in shaping the lives and philanthropic futures of young people. Although this lesson is closely related to the importance of affinity and working groups, the power of peers goes beyond structured or formal learning and grantmaking groups. Peers are found everyday within an extended family (e.g., cousins), staff and leaders from grantee organizations or next generation members of other foundations.

While we can all be influenced by peers, young people and young adults are especially influenced by peers, as a natural and important part of healthy human development.

Throughout our research and profile interviews, we found abundant evidence for the inspiration and engagement in philanthropy that comes from peer relationships, whether or not young people were actively or formally involved in their family foundation. Young people take note when they are the only ones at a meeting or conference, for example, and report feeling isolated.

The eventual impact of peer relationships that young people develop can sometimes only be fully appreciated twenty or thirty years later. One example referred to often in our interviews was nearly twenty years ago, when FADICA began to convene next generation members and emerging leaders from Catholic organizations for the Future Foundation Leadership Venture.

Peer relationships catalyze some of the most active and engaged leaders in philanthropy. The Future Foundation Leadership Venture engaged committed FADICA

members who today are making extraordinary contributions to the leadership of Catholic philanthropy and the Church. One dynamic group of women who participated in that program and in FADICA regularly over the years have been working together to enhance women's participation and roles for leadership in the Church. Key to their effective cooperation was the trust and relationships they built over the years—much of it through FADICA.

In thinking about opportunities to nurture and facilitate younger generations' peer relationships and networks, it is important to consider the longer view. Though the impacts may not be visible right away, or even over several years, the power of peers offers a significant chance to support the capacity of future philanthropic leaders and of philanthropy.

Examples of the power of peers can be seen in almost all of the foundations profiled in this publication. Members of the Raskob Foundation (profiled on page 41) describe how inspiring their cousins are. The Hilton Foundation's the Generations in Giving program (profiled on page 36) is designed in part to develop relationships among family members who are spread across the country and who grew up uninvolved in the Foundation. The I.A. O'Shaughnessy Foundation's eighteen-month training program (described on page 31) is another powerful example of an opportunity for younger family members to build skills, relationships, and capacity for leadership in their family's foundations. Often these relationships become one of the most powerful elements of mutually reinforcing family values and strengthening capacity to advance these values.

## FADICA's Philanthropy Leadership Intern Program

FADICA's Philanthropy Leadership Program (PHLIP) launched in 2014 to cultivate philanthropic engagement and leadership among promising next generation Catholic leaders. The program is centered on internships and fellowships at FADICA's Washington DC office for high school, undergraduate, and graduate students. Since 2014, FADICA has hosted fifteen PHLIP interns and fellows who have contributed greatly to FADICA's mission, learned about Catholic philanthropy and the Church, and enriched their own vocational and spiritual journey.

One undergraduate senior, Lilly Hawes, tapped into her passion for social justice to gather and create resources to support anti-human trafficking efforts, including a Vatican-hosted conference in Rome. Lilly further developed these resources into a web page for FADICA members to learn more about the issue. Upon completing her internship with FADICA, she deepened her commitment to citywide efforts against human trafficking in her university's hometown.

"I thoroughly enjoyed researching and writing about human trafficking as well as becoming integrated into FADICA's tight-knit community," Lilly reflected. "Learning from mentors and peers in the FADICA office has taught me valuable skills that I will carry with me as I enter into the workforce."

Chris Kotson, a political science major at Gonzaga University at the time of his internship, researched and co-wrote *A Call to Impact and Solidarity in the Wake of Ebola*. Chris interviewed global health experts, scholars, and local Catholic leaders on the ground in the most affected countries in West Africa. In the weeks following his internship, Chris conveyed the value of the experience on his personal development and commitment to social justice. "Because of FADICA's Philanthropy Leadership Intern Program, I have developed into a more confident professional and become increasingly passionate about philanthropy and social justice work."

There is incredible leadership and potential in the next generation of Catholic leaders, as FADICA's PHLIP has affirmed. Interns' reflections provide a glimpse of the impact and meaning that engagement in the Church and Catholic philanthropy can offer these emerging leaders.

### A PHILANTHROPIC LEADER INFLUENCED BY PEERS

#### JUSTIN McAULIFFE

Justin McAuliffe did not intend to work for the foundation that his great-grandfather founded. However, in getting to know other young people who were philanthropists and social entrepreneurs, he came to realize his unique opportunity to make a difference.

As a successful entrepreneur in New York City, Justin had not considered a career in philanthropy until in his mid-twenties when he became involved in a group of young philanthropists and social entrepreneurs. Their passion and enthusiasm for social impact reminded him of the values that mattered to him most. Having grown up in a Catholic philanthropic family, he had always been involved in service and charitable activity.

Increasingly, Justin and his peers saw their lives and values more aligned when earning money and having impact were woven throughout one's life, not separate activities. As Justin considered his own career and desire to have an impact, he was drawn toward the opportunity to serve his family's foundation, the Conrad N. Hilton Foundation, as a staff member.

Justin is early in his career at the Hilton Foundation, and has committed himself to developing expertise in his chosen new field.

# Realistic Expectations

**R**ealistic expectations of what is possible, and when, are key to success in generational engagement. Change in families takes time and it is important to establish expectations for young leaders that are realistic. Time commitment and availability, generational values, communication styles, and tensions that arise from these differences and diverse passions all support the importance of foundations moving forward with realistic expectations.

Time and scheduling are commonly reported challenges regarding expectations. Meeting times and scheduling must be accessible for young people who might be starting careers or in school. This may entail meetings on evenings and weekends, greater use of the Internet, and other measures to ensure participation is possible. Though these challenges may seem daunting, one interviewee indicated scheduling with the younger generation presents no more challenges than scheduling with current board members. The challenges are just different.

Some foundations have designed board meetings and educational events to involve families, thereby including all ages and life stages. The Gathering, a Christian philanthropic network (profiled on page 51) has thought differently about meeting locations and incorporating services like childcare. As a result, The Gathering's meeting attendance has flourished. The I.A. O'Shaughnessy Foundation, in developing its eighteen-month training program, has been mindful of designing a program to allow for optimal participation of young adult family members in the early stages of careers and family life.

Additionally, foundation leaders may find it necessary when working with the next generation to clearly define values which in the past were implicitly understood within the foundation. Just as the previous

lessons about formation, mentors, hands-on experiences, and peer networking are intentional processes, so too are the efforts to be explicit about a foundation's values and mission.

Foundations may find that in working with next generation leaders, conflicts or tensions flare up on occasion. Often this is because they are passionate, thoughtful, and engaged participants who care deeply for the issues and people involved. The alternative—disengaged descendants—would be considerably worse. Appreciating generational communication styles will undoubtedly enhance engagement with young leaders.

Foundations such as the Mustard Seed Foundation, the Conrad N. Hilton Foundation, and the I.A. O'Shaughnessy Foundation have thoughtfully approached their faith-based identity as they have sought to engage younger generations. The most effective of these engagement strategies involve encouragement of exploration, learning, and mutual discovery. The foundations profiled in this resource exhibited a desire to honor their family's historic values and founder's identity, even if some of the younger family members are less involved or not involved in the Catholic Church personally.

Finally, establishing realistic expectations may involve giving up some control in order to effectively engage younger generations. It is important to take time to identify next generation leaders with specific skills and interests, and to consider issues and approaches important to them. If foundations do this strategically, early, and thoughtfully—aware of the subtle process of change in families—all generations can experience a sense of pride and an even deeper sense of purpose.

# Donahue Family Foundation

## THE VALUE OF EXPLICIT COMMUNICATION

When the Donahue family began their philanthropy in 1990, they often engaged anonymously and wanted no attention for their generosity. In recent years they have become more comfortable with the power of sharing their philanthropic story, especially wanting their children and grandchildren to know about the values driving their family's philanthropy. They know that in order for those future generations to carry on their philanthropic legacy, they must be more explicit about how and why they have made their philanthropic choices.

A second generation family member of The Donahue Family Foundation serves as the President. The founders' influence is reflected in the Foundation's special focus on education, related educational interests, and a core Catholic Christian commitment to serving the most vulnerable and advancing human dignity.

In the 1990s, the Donahue family decided they wanted a better way to respond to the many charitable requests they were receiving. Today, twenty-six years later, they involve their thirteen children, eighty-three grandchildren and spouses in the family's philanthropy through the invitation to join the Board and learn firsthand how they approach their philanthropy. The involvement of their direct lineal descendants and spouses is their way of preparing the family to continue their philanthropic legacy when they are no longer able.

Communication is a top factor in the Donahue Foundation's significant and widespread engagement spanning generations. According to President William Donahue, effectively sharing and conveying the original intentions and mission of the founders leads to better participation. "The next generation shows respect for the founders when they understand the founders' dedication, mission, and intent. Plenty of communication is helpful—and needed—in engaging the next generation and for our Foundation's leadership."

In addition to Mrs. Rhodora Donahue who created the Foundation with her late husband John Donahue, the Board consists of seven alternating slots for family members to serve three-year terms. Other than for those who serve on the Executive or Nominating committees, the Board role is intended to be a limited commitment. Though family members can serve more than one three-year term, typically there have been a few years between appointments.

The invitation to join the Board has been met with a variety of interest. Some family members have become more involved through site visits and committee roles. Other family members have been able to participate by conference call, and some have yet to become involved. As it evolves, the Foundation continues to consider ways to involve more family members, including those who have not yet participated, and to offer substantive activity for those who are already involved or showing increased interest. Recognizing that the exposure and preparation they experience now is invaluable, Donahue family members are taking part in a long-term effort to carry on their legacy.



# 10 Real Authority

**R**eal authority is critical, and one of the most important of the key themes in next generation engagement. While this lesson is well known, the desire to protect children, grandchildren, and other young people on their path to success can limit authentic experiences of authority and autonomy. Offering opportunities for exercising real authority is easy to say, but incredibly hard to do.

In addition to hands-on experiences, young people must have real authority over clearly defined matters in order to develop leadership skills—e.g., a specific project, a separate next generation grantmaking fund, or matching grants (even if small). While apprenticeship programs, workshops, and other education platforms are important, there is no better way to learn than by doing.

As soon as children develop the concepts of “mine,” there are opportunities to help them develop empathy for others, learn to share with others, and contribute—long before they understand concepts of money. The key is to allow them some autonomy and choice with a developmentally appropriate amount of money or in-kind goods. An important aspect is giving them the authority to make their own choice over something that has “real” value. Determining what that appropriate value is depends upon a lot of factors. It takes work and some thought to determine what might be meaningful for one’s unique context.

If authority is not “real” or if decisions are overridden or undermined, an opposite lesson than the one intended may be learned. The result can be a young person feeling embarrassed, incompetent, or distrustful—and potentially losing interest in philanthropy. Defining boundaries clearly in advance can help assure everyone understands expectations.

Accountability, due diligence, high standards, written rationales, and presentations to the board are all appropriate expectations when giving genuine authority to next generation leaders. These expectations are especially legitimate when they are consistent with the high standards of a foundation’s regular grantmaking processes.

The diverse profiles in this publication offer varied ways to create authentic opportunities for real authority. The Raskob Foundation’s unique membership model invites young people to become members at an early age, and their structure and culture offer increasing opportunities for leadership. The Hilton Foundation, the I.A. O’Shaughnessy Foundation, and others offer preparation, internships, and pathways to becoming effective board members.

Additionally, affinity and working groups can offer opportunities of genuine authority outside of family philanthropy to cultivate the leadership of younger family members. One such example from Jewish philanthropy is the Slingshot Fund, which the Andrea and Charles Bronfman Foundation (featured on page 49) helped to create. The Fund is a next generation giving circle through which young Jewish donors learn many professional skills of effective philanthropy.

As these profiles and examples demonstrate, there are many different pathways through which to provide opportunities for genuine authority. Finding such pathways is vital, as authentic authority is among one of the most effective ways that people develop the skills of leadership.

## SEIZING OPPORTUNITIES FOR REAL AUTHORITY

A foundation board member reported her frustration that despite being middle aged and a successful executive—and the fact that she and her siblings were board members—her father still made all the decisions. The trustees were frustrated and despite their frustrations, they themselves had taken no action to prepare the third generation in their late teens to late twenties. Instead, the second generation was spending countless hours of what felt like wasted time. Two opportunities were missed: first, they were missing out on decades of opportunity to gradually prepare and pass on a family culture of giving; second, in spending years associating the foundation with frustration, they missed opportunities to cultivate the sense of joy and purpose that can come from family philanthropy.

# I.A. O’Shaughnessy Foundation

<b>Founded:</b>	1941
<b>Location:</b>	Bloomington, Minnesota
<b>Geographic Focus:</b>	National
<b>Assets:</b>	\$95 million
<b>Grants:</b>	\$4.5 million, annually
<b>Mission:</b>	The I.A. O’Shaughnessy Foundation is a family foundation with a mission to share the legacy of Ignatius Aloysius O’Shaughnessy for the common good, making grants that enrich communities and improve people’s lives.
<b>Website:</b>	<a href="http://iaoshaughnessyfdn.org">iaoshaughnessyfdn.org</a>

## History

I. A. O’Shaughnessy established the I.A. O’Shaughnessy Foundation in 1941 to enable the active and engaged philanthropy he enjoyed, and to continue to share a significant portion of the fortune he had made during his lifetime. Upon his death in 1973, the leadership of the Foundation was placed in the hands of his five children, who then governed the philanthropic work of the Foundation for many years.

Today, the Foundation continues to be led by family and governed by a ten-member Board of Directors from the third and fourth generations, representing the five family branches of Mr. O’Shaughnessy’s children. Participation within the family has broadened as the family has grown, and the third, fourth, and fifth generations have become involved in various ways.

## Notable about the I.A. O’Shaughnessy Foundation

I. A. O’Shaughnessy was committed to sharing his good fortune to help others and had a keen interest in building Catholic and community institutions, especially educational institutions. He also believed in his children’s decisions, so he set up the Foundation’s purpose to be flexible and reflect the priorities and needs identified by future family directors who lead the Foundation.

This foresighted flexibility, combined with a continued interest in and loyalty to I.A. O’Shaughnessy’s values, has served the Foundation well over the years as it has grown. Because the Foundation is now guided by a geographically dispersed family that has more than 120 adult family members, this combination of flexibility and loyalty has been critical in generating continued interest and participation, and also in sharing the knowledge and practice of the legacy values left by I.A. O’Shaughnessy.

In 2001, the Foundation held a meeting attended by sixty family members to develop a mission and identify the core values critical to guide the philanthropic work of the Foundation. The family members reaffirmed their commitment to work together toward a shared philanthropic purpose, and to support each other in service to their own communities. They also affirmed the Catholic heritage of the Foundation, while honoring the beliefs of all family members and of the communities served by the Foundation.

## Family Engagement Methods

The Foundation’s grant budget is currently divided equally into two main pools: Family Grants, which are generally smaller grants, guided toward community programs by the adult members of each of the five family branches; and Board Grants, which are generally larger grants, guided by the Board toward impact in one focus area – currently “to support high-quality education for disadvantaged students.”

The Board of Directors is made up of two Directors from each of the original family branches (of I.A. O’Shaughnessy’s five children). The Board governs the Foundation, leads the Board Grants program, and oversees the philanthropy of the five family branches’ Family Grants. The two Directors from each Family Branch serve as granting committees of the Board, overseeing the charitable work in their Family Branches. In 2016, the Foundation designed and implemented a customized online system for receiving and evaluating Family Grant applications. This system was added so that family members could more efficiently participate actively in the recommendation and review process.

As generations have been added and the family has grown, the Board has looked to different ways to include its family members in philanthropic service. What began many years ago as five siblings coming together informally to make annual charitable decisions honoring the values and priorities of their father has now evolved into a more complex institution that can harness the energy of this large family and empower its family-led philanthropy.

Family members now are able to engage in service in five different ways, and each opportunity has clear pathways around eligibility and participation:

1. **Board Membership** – Two family members are chosen from each of the five family branches to be Directors on the Board. Each of the five family branches chooses the family members it will recommend for Board membership. Directors must be at least thirty years of age, and be a descendant of I.A. O’Shaughnessy or a legally married spouse of a descendant. Legally adopted children are considered descendants. Board terms are for four years and are renewable.

2. **Investment Committee Membership** – The Investment Committee is made up of Board Members and family members who have an interest and expertise in the areas of investment, finance, and fiduciary oversight.

3. **Family Grants** – The Directors from each family branch oversee the Family Grants, and the adult family members from that branch make recommendations for which organizations and charitable projects are invited to apply for these grants. Each of the five branches sets up its own process and guidelines for recommending organizations and projects for Family Grants. Following the policies of the Foundation, the two Directors from each family branch oversee the process in their branch and determine the appropriateness and eligibility of each recommended grant. The Board has the ultimate oversight of all Family Grants.

4. **Younger Generation Program** – The Board developed the Younger Generation program as a way to prepare the younger generation of the growing family for Board and Foundation service. The program is an eighteen-month, hands-on philanthropic training program for young adult family members who are interested in more active philanthropic service and in learning more about their family-led foundation. Family members and spouses who are twenty-one years of age or older are eligible to participate in the training program. The program has been held with seven cohorts of family members since 2006, and twenty-eight family members have completed the program. In response to growing interest, the Foundation added a standing grantmaking committee focused on Early Childhood Education, whose membership is open to family members who have graduated from the Younger Generation program.

# Key Ways for Family Members to Engage

BOARD MEMBERSHIP	FAMILY GRANTS	YOUNGER GENERATION PROGRAM	OVERALL PARTICIPATION
<ul style="list-style-type: none"> <li>• 2 family members chosen from each of the 5 family branches to be Directors on the Board</li> <li>• Directors are at least 30 years of age, a descendant (including adopted children) or spouse</li> <li>• Board terms are for four years and are renewable</li> </ul>	<ul style="list-style-type: none"> <li>• The directors from each family branch oversee family grants</li> <li>• Adult family members from each branch recommend organizations for grant application invitations</li> <li>• Two directors from each family branch oversee the process in their branch and determine the appropriateness and eligibility of each recommended grant.</li> <li>• The Board has the ultimate oversight of all family grants</li> </ul>	<ul style="list-style-type: none"> <li>• An 18-month, hands-on philanthropic training program for young adult family members</li> <li>• Includes newly formed, ongoing grantmaking committee made up of graduates of the program</li> <li>• Family members and spouses 21 years of age or older are eligible to participate in the training program</li> </ul>	<ul style="list-style-type: none"> <li>• Family members invited to attend and observe board meetings</li> <li>• Family members welcome to attend select post-grant site visits</li> <li>• Foundation board holds an open meeting in conjunction with family reunions</li> <li>• The Foundation is piloting periodic regional family philanthropy events, with a focus on learning about the impact of local grants and the community and engaging in volunteer service</li> </ul>

**5. Overall Family Participation** – There are several ways the Foundation invites family members to learn more about the Foundation’s philanthropic program in order to empower the family’s philanthropy:

- Family members are invited to attend and observe Board Meetings
- Family members are welcome to attend select post-grant site visits

- When the family has a reunion, the Foundation Board holds an open meeting in conjunction with the reunion
- The Foundation is piloting periodic regional Family Philanthropy events where family members are invited to join the Board in learning from local nonprofit leaders about the impact of local grants made through the Family and Board Grants programs and engaging in volunteer service projects together

## The Younger Generation Program

The Younger Generation program is designed to bring a growing and increasingly geographically diverse family together to prepare for participation in the Foundation, and to encourage interest and engagement in the values of service and community responsibility that guided I.A. O'Shaughnessy, his children, and grandchildren over the years in governance of the Foundation. Developed at a time when the philanthropic field had begun to offer many resources about the generational transfer of wealth and preparing the next generation for leadership of their family-led philanthropies, the Foundation's Younger Generation program was implemented with enthusiasm and great participation.

The program has evolved over the years and ultimately led to the development of additional programs that have brought more family members to the table with the Foundation.

It is designed to work with a cohort of five to seven family members over an eighteen-month period, leading them through a series of experiential steps that introduce the principles and practices essential in the leadership and governance of a philanthropic family foundation. The cohort meets in person for three weekends, and via web conference call periodically throughout the program. The topics covered include: history of the founder and the Foundation; the honor and responsibility of being part of a philanthropic family; understanding the non-profit and philanthropic landscape; grantmaking opportunities, challenges, and practices; and family board governance and dynamics.

During the program, the participants work together to create and implement their own giving initiative with a focus area that is related to the Board's granting focus. They share leadership, develop mission, vision, guidelines, governance process, grantmaking process, and recommend \$100,000 in grants to the Board of Directors for approval and funding.

Over the years the program has evolved and been adapted in several ways, for example:

- Scheduling the program so that, even with everyone's increasingly busy schedules, there are

## HOW IT ALL CONNECTS

The I. A. O'Shaughnessy Foundation is over seventy-five years old. The family that guides the Foundation now lives in cities and communities across the country and around the world and ranges in age from newborn to ninety. New babies are born into the family literally every month. The family's growth adds power to the philanthropic work of its family-led philanthropy. Finding real and engaging ways for the family to work together in this philanthropy and to share and renew values is a critical part of this work.

I.A. O'Shaughnessy was a prominent figure who made a large and positive impact in his world, both through his business activities and his significantly generous philanthropy. His legacy as the patriarch and as the Foundation's founder are very much alive in the family and in the Foundation. His Catholic values and activities still help guide the Foundation in its work every day. The philanthropy of the Foundation, service to its shared purpose, and the responsibility of doing important and impactful work in the community can all be factors that continually bring the family together, creating and affirming shared values. Because the I.A. O'Shaughnessy Foundation has structured itself so that the five branches work together toward a common purpose and have freedom to make grants in their own communities, the Foundation has developed both the flexibility and stability needed to stay vital through the passing of years and the growth of the family. In providing opportunities for family members to engage in real tasks within the Foundation, it benefits from their combined energy and enlists them in bringing the Foundation's financial and program strength into the many next generations.

enough in-person meetings to develop a good group culture, engage in multilevel conversations, and make difficult decisions. The program found that while web-enhanced phone calls work well to provide updates and exchange information, in-person meetings are necessary for more complex tasks.

- Including activities where the cohort directly engages with and learns from the Board of Directors. There was a very strong interest in exchanges, trainings, and activities where the Board and the Younger Generation cohort could learn from each other and benefit from the various perspectives.
- Utilizing multiple types of programming to address and honor different learning styles and differing levels of comfort with technology, finances, and various types of topical content. As with many family boards, the cohorts are quite diverse in terms of age, experience, background and style.

### Development of New Engagement Opportunities

The growing number of Younger Generation (YG) program graduates, the coming of age of more fourth and fifth generation members, as well as the need on the Board to assure well-planned governance transitions and successions has created the desire for additional family involvement opportunities with the Foundation.

In response, the Board has developed two new programs that will involve more family members in active roles, and harness the family’s energy in support of the Foundation’s philanthropic mission.

The Early Childhood Education Granting Committee is a new standing committee open to family members who have graduated from the YG program. The Committee is charged with developing and implementing a granting program that addresses the educational needs of very young children (an area of interest of the Board that is not currently addressed by the Board Grants program). The annual granting budget will be approximately \$200,000. The Committee opportunity was met with strong interest and began with eight members.

I.A. O’Shaughnessy Foundation Family Philanthropy Day is a new, regional, philanthropic education, and service event designed as an opportunity for the Board and the family to learn more about the local impact of their philanthropy and about the local community needs and nonprofit landscape. It is also an opportunity

for the Board and greater family to engage across family branches and across generations about the living values that guide their stewardship. The regional pilot event was very successful. It was planned by a committee of nine family members (including two Board members and several YG graduates), and attended by forty-five family members. The event included information about the Foundation’s grants made in the region, presentations from local grantees who are nonprofit leaders, site visits, and a service project. Participation was open to all family members, and the day included age-appropriate programming for children.

### SUMMARY

#### Ways I.A. O’Shaughnessy Foundation engages future (and current) generations:

- Remains both flexible and loyal to founder’s values (engaging the next generation’s interests and harnessing the energies of the Five Branches of the family)
- Utilizes an online system for receiving and evaluating Family Grant applications for more efficiency and participation in the recommendation and review process
- Provides diverse opportunities for family member involvement and engagement
- Trains family members twenty-one and older in the Younger Generation program through cohorts of five to seven people, which includes hands-on experience, collaborative work, and learning in both in-person and conference call sessions
- Facilitates direct engagement between the Younger Generation program and the Board of Directors for mutual learning
- Has created several new participation opportunities to meet growing interest and desire for more involvement and opens them to Younger Generation program graduates
- Affirms its Catholic heritage and honors the values of all family members and those of the communities being served

# Conrad N. Hilton Foundation

<b>Founded:</b>	1944
<b>Location:</b>	Agoura Hills, California
<b>Geographic Focus:</b>	National and International
<b>Assets:</b>	\$2.5 billion
<b>Grants:</b>	\$110 million, annually
<b>Mission:</b>	We work to improve the lives of disadvantaged and vulnerable people throughout the world.
<b>Website:</b>	<a href="http://hiltonfoundation.org">hiltonfoundation.org</a>

## History

Founded by Conrad N. Hilton as a philanthropic trust in 1944, the Conrad N. Hilton Foundation has made grants of more than \$1.5 billion throughout the world. The Hilton Foundation also endowed the Conrad N. Hilton Fund for Sisters, which supports the work of Catholic sisters around the world. Conrad Hilton, also the founder of Hilton Hotels, left almost his entire estate to the Foundation and provided extensive written guidance through his will that continues to drive the Foundation's work. His son Barron Hilton joined the Foundation's Board of Directors in 1950 and has contributed significantly to the stewardship of the family philanthropic legacy. He has committed to leaving ninety-seven percent of his estate to the Foundation.

The third generation of the Hilton family is also very active in the leadership of the Foundation. Steven M. Hilton served as President and CEO until his recent retirement, and continues to serve as Chairman of the Foundation Board, on which several family members also serve as Directors. Among the more than forty descendants of Conrad Hilton, a number are involved in aspects of the Foundation, including a fourth generation family member who works full time as a member of the Foundation staff.

## A Family Foundation

The Hilton Foundation today is very much a family foundation, which is rare for foundations of its size and similar history. The leadership of the Foundation has intentionally prioritized a family philanthropic identity, and a number of key decisions have supported that identity as well. Among the most prominent of those decisions are 2005 Board resolutions that require that direct descendants of the family constitute a majority of the Board in perpetuity, and the creation of the Generations of Giving program.

The Foundation has not always had a strong focus on family philanthropic identity. Throughout its history, the Foundation's Board has had a majority of nonfamily members and notable nonfamily staff including current President and CEO, Peter Laugharn. While Peter is the first leader of the Foundation to not have a background with the family or hotel company, he brings almost two decades of experience working at two other private foundations. Another notable nonfamily influence was the longtime participation of Donald H. Hubbs, who began with the Foundation in 1969, working extensively with both Conrad and Barron Hilton. Donald Hubbs spent decades in various roles including serving as President for close to twenty-five years and as a Board Member for forty-five years. His stewardship of the founder's donor intent and unique philanthropic identity is unquestionably



important to appreciating the family philanthropic identity that drives the Foundation today. The Hilton family’s story marks important lessons for any foundation that wants to preserve family involvement and stewardship in its philanthropic legacy.

While the Conrad N. Hilton Foundation is not a religious funder per se, the organization is dedicated to honoring Conrad Hilton’s deeply held Catholic beliefs, by funding two Catholic programs that support sisters and education.

### Generations in Giving

The Generations in Giving program, often referred to as GIG, was created in 2006 and launched “to cultivate the philanthropic spirit among successive generations of Hilton family members and prepare them for board service.” With the decision to have a majority family board, the Board also allocated resources for the development of both the skills and motivation for philanthropic leadership among its future stewards.

While the GIG program represents a small percentage of the Foundation’s financial resources, it is among the most well-funded and resourced initiatives among any philanthropic institution cultivating the next generation of philanthropic leadership.

GIG includes three programs: grantmaking, board internship and retreats. The first, a grantmaking program, includes a pool of resources allocated for participating family members to direct to the issues and organizations they choose. Like a donor-advised fund, these individual grantmaking budgets are directed with wide discretion to fund any legitimate philanthropic purposes. The second program is a two-year Board internship program that is offered to GIG members. The third element of GIG is a retreat program. The retreat program provides an opportunity for Hilton family members to come together in person for the dual purposes of building relationships and skills to support the future stewardship of the Foundation. The three programs are integrated, mutually supportive, and facilitated by the Foundation staff.

Generations in Giving (GIG) Program Overview		
GRANTMAKING	BOARD INTERNSHIP	RETREATS
<ul style="list-style-type: none"> <li>• Discretionary grantmaking budget for family members</li> <li>• Staff support for exploration of individual philanthropic identity</li> <li>• Participation for family members above the age of 15</li> <li>• Matching grants offered to leverage individual giving</li> <li>• Ability to unlock matching funds by volunteering time</li> <li>• Opportunity Fund: two \$250,000 per year made collaboratively as a GIG group</li> </ul>	<ul style="list-style-type: none"> <li>• Two-year program</li> <li>• Competitive application; family members are eligible if they have fully participated in GIG grantmaking program</li> <li>• Nonvoting participation in all Board meetings and some committee meetings</li> <li>• \$100,000 grant project includes grantee selection, due diligence, site visit, and presentation to the Board</li> </ul>	<ul style="list-style-type: none"> <li>• Education about philanthropic sector, Hilton focus areas, and Foundation history</li> <li>• Opportunity to build relationships and strengthen cohesiveness of prospective family Board leadership</li> <li>• Service opportunities to work together as a family</li> <li>• Eligibility for all family members who are participating or planning to participate in GIG grantmaking program</li> </ul>

## Eligibility and Participation

The GIG program is designed to cultivate the involvement and participation of all family members over the age of fifteen. Participation is open to all direct lineal family members at the age of fifteen, when they become eligible to take part in the GIG grantmaking program. Involvement can develop with graduated opportunities for increased grantmaking, participation in retreats, the board internship program, and eventually the possibility of serving on the Board. While the Foundation did not historically foster such family involvement, and many family members grew up without any involvement or connection with the Foundation, family engagement is significant and growing. For example, about fifty percent of eligible family members have participated in the retreat program, and it is expected that that number will increase over time.

As is common for many families, most of the members of the “rising generation” are in college or in the early stages of careers and are spread across the country, creating significant challenges for taking time away from school or work. This reality impacts participation in the board internship program. For example, with quarterly Board meetings scheduled over the course of two days, the commitment of eight or more days away from school or in the early years of a job can be a significant hurdle. Potential committee meetings, the grant project, and travel time add to the time barrier to participation. Despite these challenges, interest and participation has been high and is expanding.

## Grantmaking—Developing a Passion

A key component of GIG is a focus on cultivating a passion for philanthropy. Through the grantmaking program, participants are encouraged to identify their own interests and explore their own unique philanthropic identity. There is a profound understanding that in order for a board member to be an effective philanthropist, he or she must have a clearer and authentic personal motivation. Staff are available to support the family members, but are cautious not to try to direct or shape the family member’s philanthropic interests. While staff encourages family members to be

aware of the established strategies of the Foundation, the individual grantmaking budgets allow for participating family members to fund organizations that are outside of the strategic focus areas of the Foundation.

The program is designed around an essential understanding: that an interest and passion for philanthropy cannot be forced, mandated, or demanded, but rather must come from an internal motivation or spirituality that is deeply personal. As many of the families who have been most effective at family enterprise succession know, cultivating individual passion is a critical element of fostering the next generation’s leadership capacity. The Foundation, driven by the founder’s vision and spirituality, understands this and has designed a grantmaking program to embrace this wisdom.

## Board Internship—Cultivating Skills of Leadership

The GIG board internship is designed to develop the skills required to serve as an effective Board Member. Participants attend all of the Board meetings and are active on Board Committees, with the exception of committees and discussions covering sensitive matters. Participants are also paired with an existing board member as a mentor. Potential applicants for the board internship must apply in a competitive process and be prepared to make a significant commitment of time over the course of two years.

There are typically two Board interns serving together through the two-year internship. The interns have the opportunity to manage the process of identifying, researching, and proposing a grant to the board together as a team. This collaborative grantmaking project builds upon each intern’s individual philanthropic interests, and takes them a step further by aligning them with the joint decision-making skills of board membership. In the first few years of this program, the foundation has witnessed notable impact as this process cultivates collaboration, creativity, due diligence, accountability, and other attributes of strategic philanthropy. Furthermore, the program offers a deeper appreciation for the complexity and

importance of operational aspects of philanthropy, including research and due diligence, site visits, and other activities that may not be perceived as glamorous. Such a practical grounding is an invaluable experience for both the participants and the Board to gauge the interest of a prospective Board Member and the contributions he or she could make.

### **Retreats—Learning and Building Relationships**

The retreat program offers a vehicle for more structured educational opportunities and engagement with the Foundation’s strategic focus areas. Educational topics may include the state of the philanthropic sector, the history of the Foundation, or a deeper dive into one of the program areas of the Foundation. For example, one retreat included a focus on the Foundation’s foster youth portfolio, including presentations from several staff and a powerful session with testimony directly from a young adult who had been in the foster care system.

The retreats are typically three to four days long and can be hosted either at the Foundation’s campus in Agoura Hills or at another location such as a family member’s home or a location significant to the family or Foundation. The retreats are generally held every three years however there is much interest in convening more often.

In addition to educational opportunities, the purpose of the retreats is also to build relationships and connections among the family members. Time is allocated for team building and experiential learning to foster a deeper connection with the Foundation. As many have not grown up with a strong connection to the Foundation, the retreat program is a key component of building that affinity.

### **Education and Informal Mentoring—Fostering a Philanthropic Culture**

While the GIG retreats serve as a primary formal educational forum, there are considerable opportunities for learning and informal mentoring in other contexts. Starting with the first call that a family member may

receive from Foundation staff after turning fifteen, potential participants have opportunities for formal and informal learning. Typically, the first call is a thirty-minute introduction to the Foundation and some basics about what the staff calls “the don’ts”—that is, a quick overview of GIG grantmaking limitations, such as no grants to individuals or purchasing seats to benefits dinners, and the prohibition against self-dealing and the nature of 501(c)(3)s.

Additional support is offered over the years to help cultivate family members’ interests and to encourage engagement with the organizations and issues they are funding. The Foundation is continuing to think about ways to match contributed volunteer hours and individual donations with Foundation support. Throughout the process, there is an openness to the interests of the individual.

### **Donor Intent and Family Legacy**

It is striking the amount of reverence the Hilton Foundation exhibits for the founder’s donor intent. Among the dozens of similarly sized foundations launched by a corporate icon, it is rare to see such a strong personal and familial spirit and sense of values expressed throughout the Foundation’s operations three and four generations later. The Foundation presents important lessons for any foundation wishing to maintain a consistent connection to the donor’s intent and a family spirit. This is visible both in the important ways family members have provided key leadership and contributions, as well as in the important role of nonfamily members in carrying on the values and spirituality of the founder. Across the generational transitions from Conrad to Barron, and then from Barron to Steve, the Foundation’s focus on Conrad’s original values and vision has been embraced by each new generation.

The Foundation also demonstrates the often surprising ways involvement of nonfamily member staff and board leadership can enhance the importance and sustainability of a family culture. Sometimes it is the case that a nonfamily executive director, consultant, or board member can appreciate some of

the unique attributes of the founder or the founding family in ways that family members might take for granted. For example, one of current Foundation leader Peter Laugharn's first activities as the new CEO was to convene a working group to assess the Foundation's values. The Foundation offers considerable lessons on how to encourage and support family involvement in substantial philanthropic leadership, including the strategic use of non-family members to preserve and carry on the full complexity of the founder and founding family's unique perspective, values, and spirituality.

## SUMMARY

### **Ways the Hilton Foundation engages future (and current) generations:**

- Invites family member participation in discretionary grantmaking program at age 15
- Offers a grantmaking budget for members to direct and explore their own interests
- Supports cultivation of their unique philanthropic identity
- Provides two-year board internship program for prospective Board Members
- Mentors prospective and new Board Members
- Encourages participation in other trainings such as National Center for Family Philanthropy's board training program
- Offers retreat program with educational and engagement opportunities

# The Raskob Foundation for Catholic Activities, Inc.

<b>Founded:</b>	1945
<b>Location:</b>	Wilmington, Delaware
<b>Geographic Focus:</b>	National and International
<b>Assets:</b>	\$160 million
<b>Grants:</b>	\$6-7 million, annually
<b>Mission:</b>	The mission of the Raskob Foundation is to support domestic and international projects from institutions and organizations identified with the Catholic Church.
<b>Website:</b>	rfca.org

## History

Founders John J. and Helena S. “Skipper” Raskob established the Raskob Foundation for Catholic Activities in 1945, and over the past seventy years, the Foundation has awarded over \$200 million in grants to Catholic organizations around the world. John Raskob, a notable visionary in business, among other accomplishments, was responsible for conceiving of and commissioning the construction of the Empire State Building in New York City. Helena S. Green Raskob was an artist and teacher known for her sensitivity to the feelings of others. The Foundation has over 130 family members, spanning five generations, who participate in the Foundation’s mission.

## A Different Legal Structure—But Lessons Anyone Can Apply

The Raskob Foundation has a unique legal structure as a membership corporation, which includes three types of membership and an apprentice category. (See further description of membership classes in table below.) This structure allows for a category of members (“active”) that elect the Trustees. There are currently approximately seventy Active Members of the Raskob Foundation. In addition to the fiduciary role Active Members play in electing the Trustees, members also participate in many

other aspects of the Foundation, including evaluation of grant applications. In fact, this focus on grantmaking and external impact is what some family members point to as one element of their success.<sup>17</sup> Though few foundations share this unique legal structure, nor may it be a viable option, there are many lessons that can be learned from the Raskob Foundation.

## Participation

The opportunity to officially participate in the Foundation begins when each family member is invited to become an Apprentice Member at the age of eighteen. Each family member receives a formal letter<sup>18</sup> inviting him or her to participate and describing the Apprentice Membership role, which is a three-year process during which the Apprentice Member may participate in meetings, receive training, and work with a mentor. Upon completion of the apprenticeship, family members may become Active Members by a vote of all current Active Members.

## Training

Apprentice Members participate in an extensive training program overseen by the Foundation’s Training and Education committee and administered by the paid staff of the Foundation, along with other

<sup>17</sup> Robinson, K. (1999). *Staying the Course across Generations: How Donor Intent Became Family Intent*. Retrieved from: philanthropyroundtable.org.

<sup>18</sup> See a sample letter in the appendix.

family members. The training program covers subjects including family and Foundation history and spirituality; understanding philanthropy and effective philanthropy; ethics, values, and fiduciary duties; and opportunities for personal reflection. While completion of the formal training program is required to become an Active Member, continued opportunities for training are available and encouraged. Several family members have described a culture which encourages anyone to ask questions and request clarification when something is not clear or understood.

### Area Committees and Grantmaking

The Raskob Foundation’s robust organizational structure also includes member service on Area Committees which review grant requests from different geographic areas. All Active Members are assigned to one of four geographic areas in the United States. An additional International Committee reviews grant requests for projects taking place outside the U.S. Apprentice Members are invited to fully participate in the work of the Area Committees, including participating in site visits.

The Area Committees and the International Committee review grant applications and compile a prioritized list of recommended grants for the Board’s final decision. Therefore, while the legal responsibility for grantmaking decisions rests with the Trustees, there is a culture and tradition that empowers members, and notably young members, to have significant authority and involvement in the process.

### Membership

After apprenticeship, which is not officially a membership category, there are three types of members: Active, Sustaining, and Emeritus. Only Active Members are eligible to vote for election of the Trustees. Active Members also serve on the Area Committees and the International Committee. Sustaining and Emeritus Members are offered opportunities to participate in various committees and activities, but are not eligible to vote. The Foundation and committees often opt to operate on a consensus model when possible, and the legal distinctions of who is eligible to vote becomes secondary to a culture that respects the voices of all members. Thus, both Apprentice Members and Emeritus Members are given special attention in a complementary way that honors both young people and those seasoned with wisdom and experience.

Membership Categories and Criteria		
ACTIVE	SUSTAINING	EMERITUS
<ul style="list-style-type: none"> <li>• Recommended by his or her Area Committee</li> <li>• Elected to active membership by current Active Members</li> <li>• Have received adequate training; serve on Area &amp; International Committees</li> <li>• Shall be entitled to vote</li> </ul>	<ul style="list-style-type: none"> <li>• Recommended by his or her Area Committee</li> <li>• Elected to Sustaining Membership by current Active Members</li> <li>• Have received adequate training and wish to participate in the work of the Foundation on a restricted or limited basis</li> <li>• Shall not be entitled to vote</li> </ul>	<ul style="list-style-type: none"> <li>• Have been Active Members of the Foundation for 25 years or more</li> <li>• Elected to Emeritus Membership by current Active Members</li> <li>• Shall be eligible to serve on committees and participate in the work of the Foundation</li> <li>• Shall not be entitled to vote</li> </ul>

## Opportunities for Leadership

Young members are encouraged to take advantage of opportunities for increasing leadership. Participation in the Area Committees is often the first way that new members learn about the grantmaking focus of the Foundation and have opportunities for leadership. Initial leadership opportunities can include serving as a chairperson of an Area Committee. After serving in this capacity, a member might be asked to serve on special or ad hoc committees formed by the Board, or on one of a number of permanent committees as defined in the Foundation's bylaws.

Additionally, younger members are cultivated and encouraged to become Trustees. They are also encouraged to participate in other Catholic and philanthropic leadership gatherings or represent the Foundation in membership organizations such as FADICA. There are continual opportunities to take on more leadership responsibility, and senior members of the Foundation have embraced this tradition of encouraging younger family members to take on leadership roles.

## Informal Participation and Culture

Beyond the formal structure described above, there are many informal ways that the Raskob Foundation fosters participation and formation. Many family members may have informally participated in the Foundation before the age of eighteen, as they may have accompanied their parents as they participated in annual meetings, site visits, or other leadership opportunities in FADICA or other philanthropic communities. The annual meeting of the membership is held at Irisbrook, the historic home of the brother of John Raskob. The meeting includes many opportunities for family fellowship and informal absorption of family culture and spirituality.

While children of all ages may be exploring the grounds or basement, they are also developing relationships with cousins, aunts, and uncles that will shape their future participation. Furthermore, family members have described the profound impact of meeting Catholic leaders who were doing critical work of the Church around the world when they were children and accompanying their parents on site visits or to FADICA meetings. And finally, a notable additional and unwritten capacity of the Raskob Foundation has been a cultural

orientation in which current leaders and officers have passed on leadership opportunities to younger family members.

The unique legal structure of this membership corporation creates an opportunity for broader participation and more distributed legal authority than most foundations. However, the Foundation's approach and culture offer significant lessons that could be applied to any foundation. Several of these informal and cultural elements are important elements of the Raskob Foundation's effective next generation engagement, in addition to the formal structures and practices that foster next generation engagement.

### SUMMARY

#### Ways the Raskob Foundation engages future (and current) generations:

- Invites family members to Foundation membership at age 18
- Asks them to find a mentor from current family members who are active in the Foundation
- Assigns them discretionary grant privileges
- Invites them to attend a two- to three-day workshop, introducing them to philanthropy, family foundations, and the structure and organization of the Catholic Church, as well as the structure and organization of the Raskob Foundation, its core documents, etc.
- Assigns next generation members to an "Area" Committee (4 domestic geographic committees) so they can observe and participate in funding meetings
- Invites them to the annual membership meeting, held each September at the Foundation's headquarters in Wilmington, Delaware
- Encourages them to participate on one or more of the Foundation's permanent and ad hoc committees
- Makes them aware of and encourages them to attend other organizations' next generation programs and events, e.g., FADICA
- Offers training on use of Foundation's portal (internal website of resources, education, information, etc.)
- Encourages them to participate in the Foundation's blog, an exchange of member information, education, advertisements for family information and events, Church happenings, and Foundation and philanthropic news

# GHR Foundation

<b>Founded:</b>	1965
<b>Location:</b>	Minneapolis, Minnesota
<b>Geographic Focus:</b>	Local and Global
<b>Assets:</b>	\$400 million
<b>Grants:</b>	\$20 million, annually
<b>Mission:</b>	To be of service to people and their limitless potential for good.
<b>Website:</b>	<a href="http://ghrfoundation.org">ghrfoundation.org</a>

## History

For more than fifty years, GHR Foundation's philanthropic approach has been guided by the entrepreneurial legacy of founders Gerald and Henrietta Rauenhorst and a humble embrace of their Catholic faith. GHR's mission is to improve lives by working toward a just, peaceful, and healthy future. In 2015, GHR awarded more than \$20.7 million to ninety-eight organizations globally. Led by CEO and Chair Amy Rauenhorst Goldman, the legacy of the Foundation's founders is carried on by second and third generation family members on its board and committees.

Built on a belief in entrepreneurial creativity, GHR Foundation accelerates change by nurturing promising new models and partnerships in the areas of global development, education, and health. Engaged family members continue to pursue the founder's vision of "a better way" to deliver positive change in the community, both locally and globally.

## Built-In Culture and Structure for Next Generation Engagement

As GHR looks to the future, multigenerational stewardship and intentional inclusion of subsequent generations is a priority. Each generation of the Rauenhorst family has learned by doing; leading generations consistently provide opportunities for growth and learning within the philanthropy field. Amy Goldman and GHR staff are part of this effort, helping prepare the third and fourth generations for service to GHR and the world.

GHR is fortunate to be one of five foundations affiliated with the Rauenhorst family. Each of the foundations is intentional in its work to develop the next generation family members, with Enkel Foundation specifically established with this goal in mind. Enkel is dedicated to giving younger generations a vehicle to manage a grantmaking portfolio and oversee service opportunities. Its board consists of grandchildren of the founders who identify prospective grants, conduct due diligence, and develop service-focused initiatives that positively impact communities. Enkel is paving the way for a future generation of leaders to serve Rauenhorst-related family foundations, including GHR, and the broader philanthropic community.



## Next Generation Engagement Initiatives

GHR Foundation is a direct beneficiary of Enkel Foundation efforts to train next generation leaders, with two current GHR Board Members being Enkel alumni. When a Rauenhorst family member turns sixteen, he or she receives an invitation from the Enkel Board informing them of their Board service eligibility and inviting them to participate. Once elected, new members receive support from the Board and family-philanthropy staff. The experience of awarding grants and managing service opportunities has been rewarding for Board Members and reflects this generation's learning style which emphasizes hands-on engagement. Board Members explore partnerships and award grants to local and global nonprofits to expand impact. By learning about the Rauenhorst legacy of giving along with the value of partnerships, collaboration, and long-term impact, Enkel Board Members learn and build relationships while practicing effective philanthropy.

## Enkel Connects

The Enkel Connects program is a good example of Enkel Foundation's innovative approach and focus on the next generation of philanthropic leadership. Enkel Connects is a matching program whereby a family member under the age of eighteen can donate up to \$200 to an organization and/or volunteers their time, and Enkel will match the donation one to one or the volunteer contributions at ten dollars per hour. The idea for the project emerged from a discussion among Board Members around how to support and engage family members not yet ready to serve on the Board, yet interested in improving their community. By providing grants that recognize and match younger family members' community interests, Enkel Connects encourages giving and service at a young age.

To support Enkel Board Members in their work, staff of GHR and the other Rauenhorst family foundations facilitate a learning environment for Enkel by providing board meeting support, guidance on how to solicit grant ideas, tips on how to conduct due

diligence, and connections to educational resources tied to the Foundation's grant program. By experiencing hands-on leadership and gaining exposure to experts in grantmaking, Enkel board members receive a well-rounded introduction to the philanthropy field.

## Future Development

GHR realizes the many demands on the next generation of family members—some are starting new jobs, others are advancing in their careers, and some are starting families—as well as the relatively limited number of board seats. The Board's Governance Committee is thinking creatively about how to capitalize on the energy, knowledge, and interests of the third generation through committee involvement, task forces, and advisory committees. There is not a one-size-fits-all approach, and GHR will learn alongside the third and fourth generations about how to take advantage of their commitment.

### SUMMARY

#### Ways the GHR Foundation/Rauenhorst family engage future (and current) generations:

- Invites younger generations to actively participate in grantmaking and service projects as a way to develop ownership of the work.
- Gives younger board members the opportunity to lead designating money to leverage younger family members' time and money.
- Partners with outside groups to expand impact
- Provides opportunities for community service projects, for hands-on learning, and bringing multiple generations together for impact and fun
- Reaches generations too young to know the founders through programs like Enkel Connects, teaching the legacy of giving by providing matching grants

# Jewish and Protestant Philanthropy

Jewish and Protestant philanthropic traditions offer a number of relevant lessons for Catholic philanthropy regarding next generation engagement. They have, in different and varied ways, integrated approaches that are explicitly part of their faith tradition to catalyze younger generations' involvement.

Elements of faith traditions such as tithing, a practice incorporated by many Protestant Christian denominations and Jewish communities, and the principle of *tzedakah* in Jewish tradition (literally meaning "righteousness, fairness or justice," but often used to refer specifically to philanthropic giving), provide opportunities for next generation engagement.

Tithing often refers to giving ten percent of one's income to one's congregation or community needs, or a combination thereof. *Tzedakah*, described further in the following section, can also involve tithing, always includes giving some portion of your income to those in need, and is part of a robust theological framework behind the motivations and practice of such giving.

Both of these faith traditions connect giving to a shared obligation and responsibility, and in doing so offer opportunities for next generation engagement. First, giving connects to faith-based infrastructure, in which religious institutions are involved. Second, a more formalized spiritual practice of giving is taught and cultivated among children at young ages.

The Bronfman Philanthropies and 21/64 in the Jewish philanthropic community, and The Gathering and the Mustard Seed Foundation in the Protestant philanthropic community, illustrate effective pathways to strategically engage and prepare younger generations for philanthropic leadership.

## GENEROSITY AND SHARED RESPONSIBILITY

"Tithe" literally means one tenth of annual produce or earnings taken as tax for church or clergy support. Tithing is a biblical concept, with several Old Testament references (for example, Num. 18:26, Deut. 14:24, 2 Chron. 31:5) and with the New Testament treating giving as important and beneficial (see 2 Cor. 9:7). Its first introduction as law is Leviticus 27:30: "Every tithe of the land, whether of the seed of the land or of the fruit of the trees, is the Lord's; it is holy to the Lord. If a man wishes to redeem some of his tithe, he shall add a fifth to it. And every tithe of herds and flocks, every tenth animal of all that pass under the herdsman's staff, shall be holy to the Lord."

In the Jewish tradition, the full meaning of *tzedakah*, often referred to as charity, is better understood as righteousness, justice, or fairness. This element of Jewish faith, which some have called the highest commandment, calls on followers to give to the poor and needy as an obligation of duty and righteousness, not a magnanimous act. It is also not a burden, but a blessing to be able to fulfill this duty. It can even be said that the beneficiary of aid does the giver a favor by giving the donor the opportunity.

## JEWISH PHILANTHROPY

Jewish philanthropy is among the most sophisticated and well-developed affinity or faith-based sector in philanthropy. Despite being an estimated two percent of the U.S. population, eight percent of the 100 largest foundations in the United States were founded by Jews.<sup>19</sup> Studies indicate that Jewish donors represent twenty-four percent of America's major donors, each giving more than \$10 million.<sup>20</sup> This giving includes

<sup>19</sup> Tobin, G. A. & Weinberg, A. (2007). *A Study of Jewish Foundations*. Institute for Jewish and Community Research: San Francisco, CA.

<sup>20</sup> Tugend, T. (2003). *Why Aren't Jews Giving to Jews?*. Jewish Journal.

support for Jewish institutions, though the vast majority is to non-Jewish institutions and communities. Jewish donors routinely represent twenty to thirty percent of the top fifty most generous donors worldwide.

Beyond the magnitude of the financial contributions and number of donors, perhaps more notable is the way in which many of these resources are structured. There is extensive infrastructure in almost every community to cultivate and support Jewish philanthropy, with Jewish Federations in over 150 communities across North America, and dozens of Jewish community foundations covering almost every major city and community in the United States. Many of these Jewish institutions are investing heavily in and prioritizing the cultivation of young people's philanthropic identities, and offer the philanthropic community some of the most compelling examples of effective next generation engagement.

Jewish Funders Network (JFN) exemplifies the sophistication and well-developed community of Jewish philanthropy, with over fourteen hundred national and international members, representing Jewish foundation trustees, independent Jewish philanthropists, and professional leaders of grantmaking Jewish organizations. JFN hosts an annual international conference; curates Jewish news and resources; produces original research, practical guides, and tools; teaches the fundamentals of philanthropy; holds in-person and virtual programs; and provides opportunities for collaboration of its members such as matching-grant opportunities.

Notable aspects of JFN's next generation engagement include its piloted membership dues level for younger generations, for funders under the age of 40 (with no existing family membership) and who are giving \$7,500–\$24,999 per year. The Young Funders Membership level is intended to be an on-ramp to full membership, and is currently being tested for success. JFN also includes a Jewish Professionals membership level for Jewish individuals working at non-Jewish

foundations. Thus far, JFN has found that while the reduced dues level can help to bring new young funders on board, what those young funders most value is integration into the larger network rather than being part of a special generational cohort. Young funders want to connect with more experienced philanthropists just as much as they want to meet other funders their own age.

Another form of next generation engagement within JFN is the Jewish Teen Funders Network (JTFFN), consisting of over 100 Jewish teen philanthropy programs in North America. JTFFN's purpose is to promote philanthropy and collective giving as forms of experiential education for Jewish teens. JTFFN creates, connects, and supports these philanthropic programs working with educators and professionals at synagogues, Federations, summer camps, and Jewish Community Centers, among others.

### Culture of Philanthropy

A notable aspect of Jewish philanthropy are the theological and philosophical roots of giving that inspire practices in Jewish life. As described above, *tzedakah* is an important aspect of Jewish faith life and shapes a sense of obligation that extends beyond giving to one's synagogue or Jewish community. In fact, it is estimated that over ninety percent of Jews give to non-Jewish causes.<sup>21</sup>

The ancient laws and traditions of *tzedakah* have been studied and taught for generations. Most famously, the medieval Jewish scholar Maimonides' hierarchy of giving (beginning with the most basic and advancing to the most ideal form of giving) offers insight into the tradition and values of Jewish philanthropy:

- Giving begrudgingly
- Giving less than you should, but giving it cheerfully
- Giving after being asked
- Giving before being asked
- Giving when you do not know the recipient's identity, but the recipient knows your identity

<sup>21</sup> Di Mento, M. (2013). Jewish Donors Are Generous, Especially to Non-Jewish Causes. *The Chronicle of Philanthropy*. Retrieved from: philanthropy.com.

- Giving when you know the recipient’s identity, but the recipient does not know your identity
- Giving when neither party knows the other’s identity
- Enabling the recipient to become self-reliant<sup>22</sup>

Maimonides’ framework can both challenge and reinforce current philanthropy. For example, while “joyful giving” can indeed be a profound spiritual practice, many people can feel overwhelmed by the needs and demands of giving and may not always feel cheerful about giving. The eighth stage of cultivating self-reliance points to what modern philanthropy might call “strategic philanthropy.” A central aspect of modern strategic philanthropy focuses on root causes of poverty and investment in education or economic development to create self-sufficiency and self-reliance. Within the framework’s complex layers is the idea that all of types of giving are good.

The framework of *tzedakah* can also include concepts originating in biblical agricultural laws that obligate Jewish farmers to share their produce: *ma’aser* (tithing produce); *pe’ah* (leaving a corner of one’s fields unharvested for the needy); *leket* (allowing the needy to glean one’s fields after the harvest); and more along these lines.<sup>23</sup> Although these practices in their biblical contexts relate only to farmers’ in-kind donations of produce to the needy, many Jews today study these laws as conceptual models to inform and inspire many other forms of giving.<sup>24</sup> In a similar manner, biblical and rabbinic laws mandating free loans for the poor now inform and inspire modern Jewish philanthropic discourse about microcredit and other new models of philanthropy outside traditional grantmaking.

## PUTTING THE ANCIENT INTO DYNAMIC CONVERSATION WITH THE MODERN

In both of these cases—agricultural practices and free loans—the Jewish philanthropic community puts the ancient into dynamic conversation with the modern, making clear to younger Jewish funders that the tradition is open to their innovative ideas, informed by existing Jewish experience. Young funders can write the next page in the always-expanding book of Jewish philanthropic tradition.

<sup>22</sup> *Charity (Tzedakah): Eight Levels of Charitable Giving*. Jewish Virtual Library. Retrieved from: [jewishvirtuallibrary.org](http://jewishvirtuallibrary.org).

<sup>23</sup> Cf. Leviticus chapters 19 and 23 and Deuteronomy chapters 14, 24, and 26, as interpreted in the Talmud tractate *Pe’ah*.

<sup>24</sup> Example: Fox, Rabbi B. *Moral Lessons Derived from the Laws of Leket*. Retrieved from: [ou.org](http://ou.org).

# The Andrea and Charles Bronfman Philanthropies (ACBP) and 21/64

<b>Founded:</b>	ACBP founded 1986; 21/64 founded 2002
<b>Geographic Focus:</b>	Canada, Israel, and the United States
<b>Assets:</b>	Not provided (note ACBP spent down its endowment in 2016)
<b>Grants:</b>	\$5.3 million (2014)
<b>Mission:</b>	From its inception in 1986, ACBP was envisaged as spend-down philanthropy, dedicated to strategically leveraging its entire endowment by the year 2016. This decision was a reflection of Andrea and Charles Bronfman’s belief that they could do the most good by empowering the next generation to pick up the gauntlet of innovation and create programs on their own terms.
<b>Websites:</b>	acbp.net and 2164.net

## About the Foundation

Among one of the most generous and highly strategic Jewish funders is a family that has also recognized the importance of investing in and cultivating the next generation of Jewish philanthropic leadership – The Andrea and Charles Bronfman Philanthropies (ACBP). ACBP was in the process of “sunsetting” and spent down its endowment by the end of 2016. Charles Bronfman, who oversees a family of charitable foundations in Israel, Canada, and the United States, led the Foundation to leverage all of its resources by 2016.

Created by Andrea M. and Charles R. Bronfman, the Foundation has not only engaged their own family’s next generation, but they have also invested in cultivating the next generation within the American Jewish community, and next generation philanthropy in general. In 2002, ACBP created a program within their Foundation called 21/64 as a resource to engage

the next generation of philanthropists. Today, 21/64 is a separate nonprofit specializing in next generation and multigenerational engagement in philanthropy and family enterprises. 21/64 is the widely recognized leader in understanding generational differences in multigenerational philanthropy.

## 21/64

While initially having an impact on next generation engagement in Jewish philanthropy, 21/64 broadened its mission to work on generational issues universally and in doing so has helped reshape the general field of philanthropy over the past fifteen years. National philanthropic networks, community foundations, commercial gift funds, and financial institutions, and many family foundations and family offices rely upon 21/64 for advice, training, research, tools, and consulting services to engage younger generations in philanthropy.

## Grand Street and Slingshot Fund

In addition to serving the broader philanthropic sector, 21/64 has created a program specifically for next generation Jewish philanthropists called Grand Street. This program provides a place to convene young people eighteen through twenty-eight years old who are involved or will be involved in their family's philanthropy. Grand Street begins with a two- to three-day retreat that features a mix of formal and informal exercises and discussions among the participating cohort providing them with the opportunity to engage in meaningful conversations about Jewish identity, philanthropy, family, and the intersection of the three.

After the retreat, 21/64 provides an open door for personalized coaching, referrals, and support to all members. Members are welcome to participate in programming and network events at their leisure. Given the demand for Grand Street, 21/64 recently added a Next Gen Donors Retreat for twenty-one to forty year olds from all faith backgrounds to explore their philanthropic identity and impact.

One such networking and learning opportunity that emerged from Grand Street is the Slingshot Fund. In 2004, Grand Street participants in their twenties and thirties joined together to learn about and fund innovative Jewish organizations. Initially, these young people produced a publication in 2005 called "Slingshot: A Resource Guide to Jewish Innovation" to highlight the fifty most innovative nonprofits in North American Jewish life for themselves and their peers. After that initial publication and with the support from the 21/64 staff, the emerging Slingshot community created the Slingshot Fund in 2006 to leverage their resources and create an opportunity to learn about effective philanthropy.

Also incubated out as its own nonprofit entity, the Slingshot Fund gives young people an experience of professional grantmaking, including reviewing grant proposals, conducting site visits, and making grant decisions. About eighteen versions of the Slingshot guide have been published with annual updates, issue-specific versions, and geographic supplements. The Slingshot Guide has highlighted over 250 innovative Jewish organizations over the years, and the fund has made grants of over \$3 million to these organizations. It has also been distributed to tens of thousands of potential donors.

The young people who have been involved in Slingshot include trustees of foundations, Jewish federation lay leaders, leaders of Jewish and secular women's foundations or giving circles, chairs of the boards of well-known Jewish institutions, and others. The lessons learned by Grand Street and Slingshot participants are brought back to their families, reaching exponential numbers of people who have been impacted by the Andrea and Charles Bronfman Philanthropies' investment in next generation engagement.

Developing the philanthropic leadership, skills, and networks of these important leaders within the Jewish community helps to secure a vibrant future of Jewish philanthropy. At a time when many young people may be turning away from religious institutions, Slingshot and Grand Street and Slingshot offer compelling examples of creative strategies that are engaging young people in family, community, and faith-based philanthropy.

## PROTESTANT PHILANTHROPY

Similar to Jewish philanthropy, several Protestant donor networks are taking the lead in supporting next generation engagement. The Gathering, a network of primarily evangelical Christian and some mainline Christian philanthropists, is one such example. In 1985, a small group from this community recognized the need for “a source of spiritual encouragement and a sounding board of peers” and time each year for a safe, neutral place to relax, talk and learn, and bring their families. Since then, the organization’s annual assembly has grown to include hundreds of people and multiple generations of families.

For close to thirty years, The Gathering has involved younger family members and cultivated their leadership. For example, The Gathering’s GenNext program is designed specifically for children from the age of three through twelfth grade. It combines companion content to the adult conference mixed with fun activities on- and off-site. The Gathering has also developed regional activities and mission trips that occur throughout the year. The Gathering hosts visits for adult participants to U.S. cities to learn about local ministries and one annual international trip to see a wide variety of work.

The Gathering Board is made up of seven husband-and wife-couples, and participation in the annual gathering is encouraged for families, including children of all ages. While some family foundations report difficulty in scheduling board meetings at a time all family members can attend (a topic regularly discussed at family philanthropy conferences), The Gathering has been able to implement a model that has resulted in growing demand among its current and new members. From summer scheduling when families are available to including a family focus in all aspects of programing, and through location choices, The Gathering has created a vibrant community which increasingly draws families to return.

One example of a family who has participated in The Gathering and has also strategically invested in engaging their family’s next generation is the Mustard Seed Foundation.

“It was not until we invested in the GenNext program that our participants realized we wanted to serve multiple generations. The younger you can start with families the better, rather than waiting until the children are in their twenties and thirties. At the conferences, parents bring their kids to be exposed to other families who want to encourage a legacy of giving—and that is key. We make it a good experience for the kids year after year.”

- Fred Smith  
President, The Gathering

# Mustard Seed Foundation

<b>Founded:</b>	1983
<b>Location:</b>	Falls Church, Virginia
<b>Geographic Focus:</b>	National and International
<b>Grants:</b>	\$2 million, annually
<b>Mission:</b>	The Foundation was created as an expression of the Bakke's desire to be faithful stewards of the financial resources entrusted to them, to bring together the members of their extended families into common ministry, and to advance the Kingdom of God.
<b>Website:</b>	<a href="http://msfdn.org">msfdn.org</a>

## History

The Mustard Seed Foundation was launched in 1983 by Dennis W. Bakke and Eileen Harvey Bakke with the intention to engage their extended family in common ministry. As such, the Foundation requires that all directors and staff are committed Christians. The Foundation provides grants primarily to churches worldwide that are undertaking new ministry projects including outreach, discipleship, and economic empowerment. The Foundation also awards scholarships to Christians pursuing advanced educational degrees in preparation for leadership roles in society.

The Foundation's Junior Board and urban plunge experience are next generation initiatives that invite young family members to participate in the family's philanthropy and deepen their faith in an active way. To this end, the Junior Board and urban plunges do not have the same requirement that participants be committed Christians. Instead, these programs are more inclusive, involving deep and reflective conversations about faith and action in the face of complex and challenging social issues.

## Junior Board and Urban Plunge Program

After much reflection and prayer, Mustard Seed Foundation created a Junior Board in 1997. The family knew they would be passing on their philanthropy to younger generations, but they also wanted to pass on

values and nurture a sense of joy in giving. Initially, the Foundation Board asked children ages thirteen through eighteen if they wanted to be involved and gave them a first-year budget of about \$40,000 for empowerment, discipleship, and evangelism grants. The Board and Foundation staff were amazed at how seriously these young people took this grantmaking responsibility and the decisions they made.

Over time, the Foundation added an urban plunge experience to their next generation engagement, which they host on a biannual basis. Since 1999 Brian Bakke and other adults from the Bakke and Harvey families have been taking members of the younger generation on a week-long service learning trips which they call an "urban plunge." The Junior Board has visited Chicago, Caracas, Los Angeles, New York City, and Toronto. Plans are being made to visit a megacity in Latin America.

An urban plunge is designed to expose younger family members to some of the Foundation's grantees and other "rich expressions of Christian faith" in major urban centers. Participants, age twelve through eighteen from among the Bakke and Harvey families are exposed to complex social realities such as economic inequality and race relations, and how Christian leaders are serving in communities on the forefront of some of society's most difficult issues.



## WITNESSING THE LONG-TERM IMPACT OF NEXT GENERATION ENGAGEMENT

A former Junior Board member of Mustard Seed Foundation who is now serving on the Foundation's Senior Board shared that none of his high school buddies cared that he was involved in the Foundation. "But when I got to college my classmates were amazed at what I was doing when I was a kid. They asked me so many questions that it made me stop and reflect on the things I was seeing, reading, and experiencing. Now as a Senior Board Member I can see that I learned so much and it has had a big impact on my life as an adult."

Brian Bakke, Director of the Americas at Mustard Seed Foundation, also oversees the work of the Junior Board, and states, "It is a joy to see goofy kids enter into some of this world's darkest issues and see a Christian response to that issue on a neighborhood level, and then pray about how to help that response. They grow from quiet and shy kids into bold young adults that learn to ask great questions and fearlessly seek out truth, justice, grace, and redemption."

The Urban Plunge program incorporates a grantmaking dimension, with decisions made at the official Board Meeting at the end of the week's plunge. In 2010, the Foundation began to incorporate interviews with grant applicants. Through these interviews pastors and church members marveled at the level of engagement and seriousness of the young people. After one such visit with the Junior Board, a nonprofit youth ministry decided to place high school youth on its official Board as members with full voting rights.

In addition to the opportunity to participate in the urban plunge every other year, Junior Board Members participate in three conference calls a year focused on new grant decisions and planning for the next urban plunge. This year the Junior Board also took time

to reflect on lessons learned from grantmaking and past urban plunge experiences. Since 1999 the Junior Board has selected 195 new funded projects in more than forty-seven nations and has given away more than \$1.5 million. Some of the Junior Board Members have gone on to become members of the Senior Board.

Over the past decade as they have incorporated next generation engagement activities, the Foundation has seen increased involvement and overwhelmingly positive feedback from participants. Next generation engagement has brought new energy and passion to the Senior Board and other family members, as children, nieces, nephews, and grandchildren have grown in their enthusiasm about the work and potential of the family's foundation. Even though such a significant engagement strategy takes a considerable investment of time, energy, and expertise, the Bakke and Harvey families see significant return on their investment. They offer just one example of Christian philanthropies effectively engaging younger generations in a family foundation, and providing the next generation an opportunity to apply their faith to critical social issues of our time.

## Fostering Culture and Values

Mustard Seed Foundation's next generation program manages a complex creative tension that fosters individual passion within a shared set of values, all with a targeted purpose to enhance the participation and formal Board leadership of the Bakke family. It is also worth noting that the urban plunge is designed with considerable downtime for "kids to be kids." The two or three adults who supervise the trip try to include sightseeing and fun new food experiences as well. The opportunity for these cousins to get to know one another in these more informal contexts helps to build trust and relationships that foster a sense of community and the capacity to be effective Board Members in the years to come.

## SUMMARY

### Ways Jewish and Protestant philanthropy engages future (and current) generations:

- Define a spirituality of philanthropy that is shared and celebrated in families, faith communities, and institutions
- Explicate teachings about philanthropy as an obligation and shared responsibility, beyond simply generosity
- Create separate and dedicated programs for young people to learn, meet peers, and practice the values, skills, and attributes of effective philanthropy
- Invite children of all ages to participate in age-appropriate activities, with increasing responsibility for teens and young adults
- Offer support and infrastructure for people of all ages to live out philanthropic values—both young adults and parents trying to pass on these values
- Encourage participation in travel and conferences to learn more firsthand about the complexities of social issues and how other leaders are addressing them
- Empower next generation leaders to define how they will develop their own leadership and skills in philanthropy
- Create giving circles with opportunities for young people to make decisions and learn by doing (skills of effective grantmaking: site visits, reviewing grant applications, evaluation, and due diligence)
- Mentor future leaders from extended family members and other peer families to cultivate the enthusiasm, skills, and passion for philanthropy
- Encourage and support parents with young children so that they can fully participate in skill building, peer networking, board meetings, and foundation operations

# Conclusion

**N**ext generation engagement in Catholic philanthropy offers remarkable opportunities to strengthen families, improve philanthropic impact, and support the Church. The pathway of engagement, like our faith and most things worth doing, can be challenging at times and calls on our full capacity for leadership. Like the rewards of our faith, the fruits of these efforts offer extraordinary return for individuals personally, for families, and for communities, as near as your local parish and as far as villages across the globe. The returns on effective next generation engagement are spiritual, familial, economic, and philanthropic.

This publication has included several profiles and examples of families and individuals leading the way on next generation engagement. These examples, and the families and individuals profiled, offer abundant reasons to be optimistic about the future of Catholic philanthropy. The founders and visionaries of these foundations would be proud of the thoughtfulness and leadership of current trustees, and hopeful in light of the extraordinary capacity of the next generation's gifts as prospective trustees. As the profiles and reflections hopefully show, leadership in generational engagement does not need to be perfect, and there are infinite ways to be effective in each unique context. We hope they provide encouragement and inspiration to action and creativity in next generation engagement.

As the top ten themes and profiles illustrate, a long view is required for foundations that expect to be successful, especially in Catholic family philanthropy. Next generation engagement and involving young people on this journey is best understood as a process or formation as we describe in key themes. As Christine Healey of the Healey Education Foundation put it, "This is something that must be learned over time. It takes time to appreciate the spirituality of philanthropy and the complexity of carrying on a family legacy of generosity."

Finding age appropriate opportunities for meaningful leadership and autonomous responsibility offer unique challenges for both parents and children. Despite the challenges and complexity, the opportunity to build deeper relationships within families and foundations, to have an impact on the world, and to cultivate a family of leaders who appreciate their history and spirituality is also an opportunity to create your foundation's future. While at times the journey may be slow and not without challenges, it is a road worth traveling.

# Resources

## ORGANIZATIONAL RESOURCES

### FADICA

FADICA.org

*FADICA is a network of Catholic foundation and philanthropic leaders committed to effective philanthropy for a vital church and human flourishing.*

**Indiana University Lilly School of Philanthropy**  
philanthropy.iupui.edu

**Lake Institute on Faith & Giving**  
philanthropy.iupui.edu/institutes/  
lake-institute

**Next Generation Catholic Philanthropic Leadership**  
ngcpl.org

*A new project providing leadership development and other resources for young people in Catholic Philanthropy.*

### YouthGiving.org

youthgiving.org

*The Foundation Center's newly created hub to inspire, connect and inform youth grantmaking. It includes a searchable database of hundreds of programs and resources for young people in philanthropy.*

## BOOKS

***Imagining Abundance: Fundraising, Philanthropy and a Spiritual Call to Service***

by Kerry Alys Robinson

***The Giving Family: Raising Our Children to Help Others***

by Susan Crites Price

***Classified: How to Stop Hiding Your Privilege and Use It for Social Change!***

by Karen Pittelman, Resource Generation, and Molly Hein

***Creating Change Through Family Philanthropy: The Next Generation***

by Alison Goldberg, Karen Pittelman, and Resource Generation

***Philanthropy Heirs and Values: How Successful Families are Using Philanthropy to Prepare their Heirs for Post-Transition Responsibilities***

by Vic Preisser & Roy Williams

***Silver Spoon Kids: How Successful Parents Raise Responsible Children***

by Eileen and Jon Gallo

## WEBSITES OF FOUNDATIONS PROFILED IN PUBLICATION

### 21/64

2164.net

**Conrad N. Hilton Foundation**  
hiltonfoundation.org

**Donahue Family Foundation**  
donahuefoundation.org

**The Gathering**  
thegathering.com

**GHR Foundation**  
ghrfoundation.org

**Healey Philanthropic Group**  
healeydfoundation.org

**I.A. O'Shaughnessy Foundation**  
iaoshaughnessyfdn.org

**Jewish Funders Network**  
jfunders.org

**The Loyola Foundation**  
loyolafoundation.org

**Mustard Seed Foundation**  
msfdn.org

**The Raskob Foundation for Catholic Activities**  
rfca.org

**Sisters of Charity Foundation of Cleveland**  
socfcleveland.org

## CHILD PROTECTION

### Mentor:

**The National Mentor Partnership**  
mentoring.org

**Office of Child Protection through the Diocese of Grand Island**

child.gidiocese.org/ParentResources

*The USCCB's recommended resource list and guide for parents.*

### VIRTUS Online

virtusonline.org

*A program of The National Catholic Risk Retention Group, VIRTUS is a best practice program for prevention of wrongdoing and promotion of "rightdoing" within religious organizations.*

## SELECTED RESOURCES IN NEXT GENERATION PHILANTHROPY

### 21/64

2164.net

**Emerging Practitioners in Philanthropy (EPIP)**

epip.org

**Families Funding Change: How Social Justice Giving Honors Our Roots and Strengthens Communities**

ncrp.org/wp-content/uploads/  
2015/10/Families\_Funding\_Change.pdf

### Grand Street

**A Giving Community Founded by 21/64**  
givingcommunities.org

**Jewish Teen Funders Network**

jtfn.org

**National Center for Family Philanthropy**  
ncfp.org

**Next Gen Fellows**

exponentphilanthropy.org

**Nexus Global Youth Summit**

nexusglobal.org

**One Percent Foundation**

givingcirclesfund.org

**Resource Generation**

resourcegeneration.org

**YouthGiving**

youthgiving.org

## GIVING CIRCLES

**Regional Association of Grantmakers – Giving Circle Knowledge Center**

givingforum.org/topic/giving-circles

# Appendix

## Sample Letter: Invitation to Become an Apprentice Member of The Raskob Foundation

RASKOB FOUNDATION FOR CATHOLIC ACTIVITIES, INC.  
10 MONTCHANIN ROAD  
P.O. BOX 4019  
WILMINGTON, DELAWARE 19807 U.S.A.

TELEPHONE: (302) 655-4440 / FAX: (302) 655-3223  
WWW.RFCA.ORG

Dear \_\_\_\_\_,

Since you will have reached your 18<sup>th</sup> birthday by September of 2016, it is my pleasure to extend a personal invitation to you to become an Apprentice Member of the Raskob Foundation at this year's Annual Meeting of the General Membership. The Foundation will hold its Annual Meeting in Wilmington, Delaware, on ...and you are invited to attend and participate. If you elect to join, you will receive all mailings pertaining to the meeting.

Apprentice Membership is the first step in becoming an Active Member. For Active Membership, an individual must be trained in the work of the Foundation for three years, nominated for membership by his/her Area Committee and elected to membership by a majority vote of the Active Members. As an apprentice, you would become a Member of the ....and be expected to attend their meetings. If the time commitment is too much at age 18, Apprentice Membership can be delayed until a more convenient time. You may contact your area chairpersons or the RFCA office when you are ready to participate, and we will follow up with you yearly.

Enclosed is an **"Invitation to Become an Apprentice Member"** which I ask you to complete and return ....

We truly hope that you decide to become a Member of RFCA and continue the work that John and Helena believed was so important. In the meantime, it has been suggested that each Apprentice Member should have someone who is already a Member as a mentor—someone you would feel free to go to with questions about the Foundation. We ask that you choose such a person from among the Active Members on the enclosed list.

# Acknowledgments

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Many other FADICA members participated in the making of this book, including those whose stories are shared in the Top Ten Themes chapter. We thank each and every one of you for your participation, time, thoughts, review, and sharing of experiences and lessons learned along the way.

Thank you to all the members who planted seeds of the vision for this book, especially those who launched and participated in FADICA’s next generation engagement through the Future Foundation Leadership Venture and the Philanthropy Leadership Intern Program.

Lastly, thank you to William Lyons, who consulted with FADICA, conducted interviews, drafted major portions of the resource, and conceived the Top Ten Themes; and to the FADICA team who coordinated additional drafting, editing, production, and design of this highly collaborative project.

And thank you to Alexia Kelley who conceived of the idea for this publication and led its coordination.



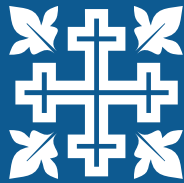
## FADICA'S MISSION

Foundations and Donors Interested in Catholic Activities, Inc. (FADICA) is a network of private foundations and donors supporting Catholic-sponsored programs and institutions. FADICA's mission is to enable its members to be informed, involved, and effective in addressing Church needs through their philanthropy.

FADICA accomplishes this mission through ongoing education, fostering the exchange of information and experience, commissioning research, building a spirit of fellowship and shared faith, facilitating occasional joint funding ventures, and promoting interaction with Catholic leadership.

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