



Activities to Involve Children in the Family Foundation

Geared toward children ages six to 13

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Why activities for children?

Family foundation trustees often ask, “How do I get my children involved in philanthropy or in our family’s foundation?” There is no one way or one activity that will get your children interested in your philanthropic work. As one family foundation trustee commented, teaching children to care is a mix of the “drip coffee” method and “espresso shots.” You need to use words and actions consistently to demonstrate the values that are important to you (drip method), but also engage in one-time directed activities (espresso shots) with your own children or those in your extended family who will be eligible to serve on your foundation’s governing board someday. The activities that follow will help you present to your family the valuable and meaningful work of your foundation and the importance of philanthropy.

To what degree do you want to engage your children in your foundation?

Understanding your immediate and long-range goals will help you decide which activities will help you achieve them.

Do you just want your children to understand what the foundation is and why the adults get together periodically? Are you considering giving them some grantmaking experience? Are you exploring the idea of creating a junior board? Regardless of where you are on the continuum, remember that once you’ve introduced your children to the foundation’s work, you need to be prepared to keep them involved in ways they choose. Let them guide you on how engaged they want to be. And listen to what they have to say.

For many, the following activities simply will start the conversation about your family’s foundation with your children. Keep in mind that as your children mature, their interest and involvement in philanthropy and your foundation may change. This guide offers many opportunities to support them along the way.

Stewardship Principles for Family Foundations

Principle IX, Practice Option C

Provide avenues for younger family members to learn about and participate in the work of the foundation prior to serving on the board.

The Activities

How to Use These Activities

The activities are geared toward school-age children ages six to 13 who have had limited or no introduction to nonprofits, foundations, or your family's engagement in the work of philanthropy.

Introduction

This guide serves as a starter kit. We recommend you do the activities in the order presented because they build on each other. However, if you are interested, or your children are ready for one of the activities out of order, you should feel confident that with minor tweaking, individual activities will still have an impact.

A great place to do these activities is at a family foundation retreat where the children are all together and can get to know each other better. See page 12 for information about hiring a facilitator and travel policies for a family foundation retreat.

Overview of Activities

- Most activities are planned for an hour each. Activity 4 is planned for a half hour.
- Each activity has a time guide based on a group of approximately ten children. Things may move faster or slower depending on the number of children and their ages.
- Activities 2 and 5 require adult/parent participation, noted as **AP**.

ACTIVITY 1: Community Needs, Part 1

To begin thinking about grantmaking, children need to get a sense of the bigger picture: What is in a town or community and who would need assistance? During this exercise, the children work with a facilitator to create their own community and develop a sense of ownership for this imaginary place. They think through what exists in the town, the kinds of places that need help, and the kinds of nonprofit organizations that can help.

ACTIVITY 2: Community Needs, Part 2

Children take the next step in understanding their town by determining what the nonprofits need. This exercise also introduces them to the grantmaking process. Children and parents work together on the first part of this activity. The children then work with a foundation staff member or facilitator without their parents. **AP**

ACTIVITY 3: The Three Ts—Time, Talent, Treasure

Once the children have had the experience of giving away funds in Activity 2, they learn about other ways people can help. Children read about fictional and historical characters who have helped others using their time, talent, or treasure.

ACTIVITY 4: The Quiltmaker's Gift

Reading a story is a good way to discuss values with children—in this case, the intangible, personal rewards of giving things away. Use the story as a springboard to discuss what's important to the children and how they feel when they give things away.

ACTIVITY 5: Founding Donor/Older Generation Interview

Children interview your founding donor or family members with recollections about the founding donor. They learn about this person and why he or she created the foundation. **AP**

ACTIVITY 6: Grantmaking Exercise

Children read simplified grant applications actually received by your foundation. They determine whether they would fund the organizations and then find out whether your foundation did so. This exercise shows the children your foundation's work and the responsibility of foundation board members.

ACTIVITY 7: Volunteering Together, Optional

Read the *The Giving Family* excerpt about volunteering. Consider taking your children on a site visit or engaging in a volunteer activity together, either during or after the retreat.

If you have questions about these activities or need help thinking through changes you'd like to make to reflect your family's circumstances, please call the Family Foundation Services department at 202/467-0407 or e-mail family@cof.org for assistance.

ACTIVITY 1:

Community Needs, Part 1

1 Hour

Outcome: Children gain an understanding of what a community contains.

Strategy: Create a community, thinking through its composition and needs; make a mural of the imaginary place.

Supplies: Flip chart paper and markers for the discussion; mural and construction paper, markers, stickers, and glue-sticks for the activity.

00:00 **Arrival.** Make nametags if the children and facilitator do not know each other.

00:05 **Introductions and warm-up.** Everyone tells their name, age, and a particular like (such as their favorite ice cream). Play a warm-up game if needed.

00:10 **Brainstorm places in communities.** Tell the children they will create an imaginary town. On flip chart paper, record their ideas of what is in the town, encouraging them to think of all facets: education, health, entertainment, tourism, business, public services, etc.

00:17 **Who owns what?** Discuss the differences among the kinds of places that someone can own, places the government funds and places that are *nonprofits*, which no one owns and the government does not fund.

00:25 **Name the community.** Brainstorm names and select one together.

00:28 **Create mural.** Create a mural of the imaginary town. Make sure each child has something different to draw. One child writes the town's name on the mural. *Optional: After drawing their places, the children write a few sentences about what they have drawn.*

00:50 **Tour the neighborhoods.** Children show each other their part of town.

01:00 **Conclude.**

ACTIVITY 2:

Community Needs, Part 2

1 Hour

Outcome: Children learn about the decision making process for distributing funds to address community needs.

Strategy: Engage the children in a discussion of how to disburse a set amount of funds.

Supplies: Mural from Part 1, flip chart paper, and markers.

00:00 **Arrival.** Adults and children arrive. The facilitator recaps what transpired during Activity 1.

00:05 **Tour the neighborhood.** Children take the adults on a tour of the town. They explain their sections of the mural describing the places they drew and answer questions.

00:10 **Determine needs.** Each child is paired with an adult. The facilitator has sheets of paper each with the name of a type of organization written at the top; for example, library, school, hospital, homeless shelter, animal shelter, museum, and daycare center. Each child selects a sheet of paper and works with an adult to develop a list of what that organization needs to operate.

00:20 **Community meeting.** Each adult/child pair shares the list of needs they created. The time to report out varies based on the number of pairs.

00:30 **Influx of funds.** The foundation founder or family member tells the children that he or she sees many needs in the town and then gives them \$100, with instructions to decide together how to give away the money.

Decision making. The facilitator takes the children to a separate room that has been set up for a meeting and moderates a discussion about how to give away the \$100.

1. Select one child to chair the meeting. Conduct an open discussion about what to fund. Give each child a chance to advocate for a particular organization. Discussion can center on places or specific items to be funded.
2. Children vote for their choice by a show of hands or placing stickers on a flip chart paper with the organization names. (If there are children who do not read yet, make a sketch of the nonprofit next to the name.)

00:50 **Regroup.** Children return to the adults' room and report on how they want to grant the funds. The foundation member prompts the children to talk about the process. What was it like to make the decision? How did the discussion go? Was it easy or difficult to come to consensus? How did it feel to come to a decision and give the money away? Would you do it again? (If it is an option, ask the children if this is something they'd like to do during the year.)

01:00 **Conclude.**

ACTIVITY 3:

The Three Ts: Time, Talent, Treasure

1 Hour

- Outcome:** Children learn about what they have to offer: time, talent, and/or treasure.
- Strategy:** Read books about fictional and historical characters, distinguishing the ways individuals can make a difference.
- Supplies:** Books (see below for suggestions on finding appropriate books.)
- 00:00** **Arrival.** Children come together, sit in a circle, and play a warm-up game.
- 00:05** **Recap Community Needs exercise.** Pose questions to recap the Community Needs exercises. What did you create? What kinds of places did it have? How did you determine what the nonprofits needed? When you made your imaginary community, you gave away money, or *treasure*. You can also give of your *time* or your *talent*.
- 00:10** **Discussion on time and talent.** Pose the questions:
- What are ways that people can help with their time? With their talent?
 - Have you ever helped using your time and talent? What did you do? How did you feel when you did it?
- 00:20** **Examples in literature.** Divide the group into pairs and distribute picture books or articles to each. Children read and then answer the following questions:
- What was the problem?
 - How did the main character help?
- Note on finding books:**
- In addition to visiting your local library children's section, you can search on the Internet for children's books on giving and philanthropy. Annotated bibliographies are available at www.learningtogive.com/materials.
- 00:40** **Presentations.** Children present their answers to the group. The facilitator records their answers on flip chart paper, placing them in one of two lists:
- What motivated the characters to help?
 - What would you have done in the same situation?
- 00:55** **Related experience.** Ask the children what kinds of things on this list they have done to help—giving their time, talent, or treasure—and who they helped.
- 01:00** **Conclude.**

ACTIVITY 4:

The Quiltmaker's Gift

30 Minutes

Outcome: Children learn about the emotional value of giving.

Strategy: Read a fictional story about a greedy person who becomes altruistic.

Supplies: Brumbeau, Jeff. *The Quiltmaker's Gift*. New York: Orchard Books, 2000.

00:00 **Arrival.**

00:05 **Read story.** Read *The Quiltmaker's Gift* aloud.

00:20 **Follow-up questions.** Engage in a book discussion.

- How did you feel about the king at the beginning of the story? At the end of the story?
- Describe the king and his change of heart in your own words. Do you know anyone who is like this?
- What about the quiltmaker? Was she being mean or kind to the king and why?
- Have you ever given away things that are important to you? How did you feel when you gave them away?
- What would you do if you had to give everything away to get one thing you really want?
- What would you want so much that you would part with all your belongings? What's most important to you? Why?
- Is it important to collect stuff? Why? Why not?
- As a family, what could you give away together?
- What makes you happy?

00:30 **Conclude.**

ACTIVITY 5:

Founding Donor/Older Generation Interview

1 Hour

Outcome: Children learn about how the XYZ Family Foundation came about.

Strategy: Interview the person who started the foundation or family members with recollections about the founding donor.

00:00 **Arrival and warm-up game.** On each child's back, place a sticker with the name of a famous character or family member. Children walk around and ask yes/no questions until they figure out who the person is on their sticker.

00:05 **Recap and connection to the XYZ Foundation.** Recap the group's activities so far (Community Needs, Three T's, *The Quiltmaker's Gift*).
Next: Who started the XYZ Family Foundation?

00:10 **Storytelling and/or interviewing.** Use either technique, based on the comfort level of the family members.

Storytelling

- If the founding donor is still alive, the founder tells the children a story about when he or she was their age and talks about what life was like—what kids did for work, what kinds of adventures they went on, etc. The founder recounts his or her decision to start the foundation.
- If the founding donor is deceased, family members tell stories about the founder—what the founder liked to do, what the founder looked like, and why the founder started the foundation.

Interviewing

- Both the interviewee and interviewer should prepare before meeting. If the interviews will take place during a family retreat, parents can prepare children ahead of time and work with the children to develop questions. The founder or family members can bring pictures to spark their memory.
- Interviews can be done in more than one sitting. If time is running out, find another time to get together.
- Sample interview questions are included in the appendix on pages 13–14.
- **Consider recording the interview (audio or video).**

01:00 **Conclude.** If there is time, children may report back to the group about what they learned.

ACTIVITY 6:

Grantmaking Exercise

1 Hour

Outcome: Children learn about who/what the XYZ Family Foundation supports with its funds.

Strategy: Engage in a grantmaking exercise using real grant applications to the foundation. This exercise is most appropriate for upper elementary school-age students.

00:00 **Arrival and warm-up game.**

00:05 **Connection to the XYZ Foundation.** The children will have the opportunity to see how the XYZ Family Foundation helps the community.

00:10 **Mission and funding priorities.**

1. Talk about the big decisions the founding donor made when starting this foundation.
2. Introduce the concept of a mission; read or paraphrase the actual mission.
3. Discuss what kinds of organizations the foundation supports and how the foundation decides what and where to fund.

00:20 **Grantmaking exercise.**

1. Distribute narrative summaries of actual grant applications that the foundation has both accepted and rejected. Children read them in pairs. If the narrative is dense, prepare in advance a summary of the organization and key facts.
2. Each pair makes a list of pros and cons for funding that project.
3. Each pair presents their grant and their pros and cons to the rest of the group.
4. Everyone votes on whether to fund it.
5. The facilitator reveals if the grant was actually funded and why or why not.

00:45 **Evaluation.** Pose questions to the group:

1. Was it hard to decide where to give money?
2. If you were in charge, what would you do differently?
3. Do you think the mission reflects what you value?

What would you like to fund if you were a foundation board member?

01:00 **Conclude.**

ACTIVITY 7:

Volunteering Together

Excerpts from The Giving Family, by Susan Price

Volunteering

Helping your children share their time and talents can be one of the most rewarding things you do as a parent. The payoffs—for children, parents, and the community—are many.

Volunteering is one of the best ways to build a child's character and self-esteem. Children who volunteer acquire new skills, develop confidence and maturity, put their own problems in perspective, meet people from other backgrounds, and learn teamwork and civic responsibility.

For families, volunteering is a good way to spend quality time together, to share experiences, establish traditions and have fun, all while helping the community. Family volunteer work can create a strong bond, helping family members communicate with and be supportive of each other.

Finding a Project

The simplest projects can be found right in your neighborhood. A senior citizen may need help with yard work or grocery shopping, for example. Anywhere you look, you can probably find a person in need of assistance.

Other ideas for projects may come from groups you are affiliated with already, such as a religious institution or school. Many newspapers and city magazines list volunteer opportunities and a variety of volunteer options can also be located through Internet sites [such a volunteermatch.com]. Some families make it a practice to volunteer for the local organizations to which they give money. This lets their children see first-hand what the needs are and how contributions of both time and money can make a difference.

Be aware that many organizations prefer adult volunteers but will accept children who are accompanied by parents. Be sure to inquire about age requirements before you sign on to a project with your kids.

Moving Forward

Plan a volunteer activity during your family foundation retreat or as a follow-up to the retreat. Keep in mind the abilities and interests of the children. Don't plan something too ambitious, especially the first time around. There's always a second time to look forward to.

Example: The children of one family foundation decided to give \$100 to a local park during the Community Needs exercise at their family foundation retreat. A few weeks later they went with their families to the park to present the grant to the executive director and plant a tree.

Possible activities are:

- One: Pick up litter at a park.
- Two: Walk dogs at an animal shelter.
- Three: Shovel snow or rake leaves for a shut-in.
- Four: Collect canned goods for a food bank.

Next Steps

Engaging your children in these activities may or may not pique their interest in developing a junior board, but this certainly is a good place to start.

There are many resources for families that would like to teach children about philanthropy and many foundations that have found ways to involve children in their philanthropies.

Book Recommendations

Price, Susan. *The Giving Family*, Washington, DC. Council on Foundations. 2003. www.cof.org/publications. Susan Price is vice president at the National Center for Family Philanthropy.

Esposito, Virginia and Frey, Eleonora. *Using Advisory, Adjunct, or Junior Boards in Family Philanthropy*, Washington, DC. National Center for Family Philanthropy. 2007. www.ncfp.org. Virginia Esposito is president of the National Center for Family Philanthropy, and Eleonora Frey is a member of the Frey Foundation Next Generation advisory board.

Article Recommendations

Siska, Darlene and Brody Hamilton, Deborah. “Involving Children in Philanthropy.” Association of Small Foundations. 2007. www.smallfoundations.org.

Family Philanthropist. “Planning for a Successful Transition.” Council of Michigan Foundations. Spring 2006. www.cmif.org.

The Foundation Source. “Engaging Family Members in Philanthropy.” Social Venture Partners International. June 2004. www.svpi.org/news_archives.

Family Matters. “Resources for Engaging the Next Generation.” Council on Foundations, Family Foundations Services. Summer 2004. www.cof.org.

Organizations

Resource Generation (www.resourcegeneration.org)—a national organization that works with young people 18–35 with wealth.

Hiring a Facilitator

Adapted from *Principled Planning: A Guide to Family Foundation Retreats*, 2006

If you plan to conduct the activities during a family foundation retreat, consider using a philanthropy consultant, a professional associate, or a foundation colleague who is skilled in facilitation for your retreat. In the end, it doesn't matter *who* the facilitator is, but that he or she is a neutral party with no stake in the outcome. And whomever you select to lead the children's activities, it is worth mentioning that you want to be certain that he or she has experience working with children. Facilitators:

Are skilled at guiding groups. An outside facilitator has expertise guiding group process. Unless the chair or one of the members has skills in guiding unstructured group discussion, you should consider engaging the help of an expert.

Are objective. An outside facilitator represents a neutral party, which can help the group reach consensus despite different opinions and agendas.

Level the playing field. Facilitators mitigate the influence of dominant people, helping everyone's voice to be heard.

Allow for equal participation of members. With a facilitator in the midst, the entire board or governing body (and staff) can participate fully as a member of the group, rather than serving on the sidelines.

Diffuse conflict. Facilitators can be bolder than peers might be. They can name conflict and/or unproductive behavior as they see it, and help turn it into a constructive conversation.

Travel Policy for Family Foundation Retreats

From the COF Legal Department

If your foundation has developed a travel policy, the expenses of the retreat should fall within its bounds. If your foundation has not developed a travel policy, the Council strongly encourages you to do so. A travel policy will set parameters for transportation and meal costs as well as hotel rates and miscellaneous expenses. The foundation should generally not pay the travel expenses of family members who accompany trustees but have no official position or duties for the foundation. Under the Tax Code, these individuals are most likely "disqualified persons" and the foundation may not make payments to or for their benefit. Such payments could be considered acts of self-dealing and subject the foundation to penalty taxes. Although an exception to the self-dealing rules allows the foundation to pay the travel and meeting expenses of board members, this exception does not apply to disqualified persons who have no official role in the foundation's work. Some foundations choose to pay family members' expenses and treat such payments as taxable compensation to the trustees; this may be permissible so long as the total amount of all compensation received by the trustee is reasonable. Consult your lawyer or accountant with specific questions about expenditures in this area.

Appendix

Sample Questions for Interviewing Family Members

Your Grandparents

Who were your grandparents?
Where were they born and where did they live?
What did they do for a living?
Do you have memories of them?
What traditions are still practiced in your family?

Childhood

What type of home did you live in as a child? What was it like?
Who lived there? Who visited?
What were your duties as a child?
What did you do for fun?
Did you have any pets?
What did your parents do for a living?
When did you get your first job?

Childhood Memories

What did you do on weekends?
Did you attend religious services? Where?
What holidays were important growing up? How did you spend them?
Was your birthday celebrated? If so, how?
Did you travel with your family? Where? Why?
Do you remember any blizzards or tornadoes or floods?

Friends

Who was your best friend?
What did you and your friends do when you got together?
Did you and your friends play any organized games?

Hometown

Describe the town where you grew up.
What was the largest town you remember visiting when you were young?
Did you ever travel on a train?
When did you learn to drive a car?
When was your first plane trip? To where, and why?

Outlook

Whom did you admire most when you were young?
When you were small, what did you hope to do when you grew up?

Education and Career

Where did you go to elementary and high school? What was it like?
Did you continue education past high school?
Did your family support, oppose, or encourage your educational pursuits?
Who influenced you most and helped you to develop your skills?
What were challenges in your career? What did you like?
Would you choose the same career if you had it to do over?

Political and Civic Life

Did you go into military service? If so, what did you do there?
What memories do you have of war years?
To what organizations have you belonged?
Have you been politically active during your lifetime?
Which presidents have you voted for?

Philosophy and Outlook

Do you have a philosophy of life to share?

Do you have a favorite philosopher, teacher, or writer who best expresses your philosophy?

Do you have religious leanings or strong religious beliefs?

In your opinion, which have been the greatest advances or inventions of all?

What things have given you the most pleasure or satisfaction?

Is there anything that has caused you continued concern?

What events or trends have disturbed you most in your lifetime?

What do you consider to be your most important achievements?

What amazes you the most about changes over time?