Engaging the Next Generation

Top Ten Tips for Charitable Advisors on Engaging the Next Generation

Charitable planning often takes into account the role that next generation family members will play in serving as trustees and successor trustees of foundations, donor advised funds and other vehicles. With four generations above the age of 21 in American society today, “the kids” are often adults by the time they become involved in philanthropic activities. What follows are ten tips for engaging adult children in charitable endeavors.

1. **Foster a transition from a parent-child dynamic to one of peers.**

   While we might imagine our children as they were at age 5, 12 or 16, often they are more like 25, 35 or sometimes 45 when they become trustees of charitable vehicles. Adult children bring academic degrees, work experiences as well as their own values to bear on the responsibility of making philanthropic decisions. Consider how you might transition the relationship between parents and children to one of peers making philanthropic decisions where every voice is heard.

2. **The “next generation” is two different generations—Generations X and Y—with distinct personalities: use different approaches for each generation.**

   Members of Generation X were born between 1964-1980 and often bring a strong sense of independence, resourcefulness as well as skepticism to institutions. Learn how you can embrace the creativity as well as the curiosity of Gen X family members even if it means creating new funding vehicles for them to explore their own philanthropic identities. Gen Yer’s have birthdates between 1981-2000 and were reared on the Internet and its many applications. They are used to using technology to access information and to engage in civic activities. Consider offering them ways to tap into information about their family’s giving and grantees. Also consider internships and other means of hands-on involvement.

3. **Generational personalities are enduring.**

   Traditionalists (born 1925-45) and Baby Boomers (born 1946-64) also tend to carry certain generational hallmarks. Traditionalists who lived through the Depression tend to 'save for a rainy day' and believe in building lifelong institutions while Boomers invest in causes like the social movements in which they grew up. Help clients comprehend that the "generational personalities" of Gen X and Y will continue to influence their values and decision-making just as the events and conditions of Traditionalists and Baby Boomers continue to influence theirs.

4. **Uncover the values that lie beneath the next generation's choices.**

   Encourage clients to take time to discover what motivates someone else's choices—members of different generations may find they have a lot in common with each other. A Gen Yer's wish to support microloans in rural Kenya and her grandpa's funding of scholarships in Chicago might both be choices rooted in creating opportunities for low-income people. So as not to become polarized by seemingly divergent decisions, consider using 21/64 Motivational Values Cards® and other tools to help families unearth the values beneath them.

5. **You don't have to step away to let the next generations step up.**

   Think about ways clients might share and trade power rather than transfer it. Facilitate conversations among family members about the roles they want to play in philanthropy. Help create multiple paths of engagement for next generation family members such as separate grant and investment committees, site visit teams and internships. Also consider helping senior family members find new yet equally meaningful roles.

6. **Learning is a two-way street.**

   As advisors and families prepare the next generation for their philanthropic responsibilities, there is a tendency to assume learning has to be unilateral, with one generation educating another. While the next generation might not have the longevity of experience possessed by the older generations, they have fresh skills and perspectives to bring to the table. Once asked to share what they know, next generation family members tend to be more receptive learners.

7. **Captivating new leaders requires more than a Facebook page or a twitter account**

   Despite the next generation's facility with technology, it is a means to an end rather than an end in itself. Concentrate on first building relationships among trustees, and between trustees and grantees. Email and social media can then provide a means of communication after a relationship has been established.

8. **Transparency matters.**

   Access to information is a given these days. While advisors and parents often worry about "the kids" learning about family money or philanthropic resources at too young an age, current technology allows next generation family members to Google more than we realize. Rather than worrying about *what* next generation family members may know, help clients with *how* to discuss what is already in the open and provide the next generation with tools and skills for handling their philanthropic legacy.

9. Show rather than tell.

Experiential learning is preferable to didactic learning with the next generation. Encourage tactile experiences like site visits, grantee presentations, philanthropy conferences and educational journeys to learn about funding areas.

10. Drawing people in is easy. Sustaining their engagement requires change.

Next generation family members can only stay at "the kids' table"—or the junior board or the associate position level—for so long. Material involvement is eventually what all adults seek. Discuss the trajectory of what their participation will look like so that along with what is expected of them, they know what they can expect in return.

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