



## Giving as a Family

*Families are more likely than ever to work together on philanthropic projects. For best results, all family members should come to the table prepared for an open dialogue about their goals and expectations.*

A few years ago, Susan Raymond, Ph.D., and her husband called a family meeting to talk about philanthropy. They asked each of their children to select a charity of their choice for a donation, then describe what they thought the charity could do with the money. The youngest son chose to support cancer research. The middle daughter selected Seeds of Peace, an organization that works with young people from regions of conflict. The eldest son, who was about to be deployed to Iraq, picked the family support group for his battalion.

"For each of them, the theme was 'personal engagement,'" explains Raymond, Senior Managing Director of Research, Evaluation, and Strategic Planning at Changing Our World, a philanthropic consultancy. "We didn't try to dictate the terms of their philanthropy, just set up a process for them to keep thinking about it."

Raymond believes that the early engagement of her children in charitable projects made it much easier for the family to have productive conversations about philanthropy. Her children had already had years of experience with volunteering and a deep involvement with charitable causes. For example, her daughter started her first foundation in the third grade. With the help of friends and fundraising projects like a lemonade stand and a tag sale, she donated money to Sound Shore Medical Center in New Rochelle, N.Y., and to a children's hospital in Warsaw, Poland. Her younger son raised nearly \$10,000 to support women with limited resources who were undergoing chemotherapy for breast cancer.

As more and more families work together on their philanthropic projects, many are finding that the best way to find common ground is to begin charitable works as early as possible and to come to the table ready to talk openly and thoughtfully about what they hope to achieve.

### The Next Wave of Philanthropists

An old saying goes that each generation must ultimately bow to the next, but that doesn't mean the older generation should bow out entirely. Some organizations are fostering continuity in charitable giving by encouraging intergenerational philanthropy. One such organization is 21/64, a division of the Andrea and Charles Bronfman Philanthropies. "Twenty-one is when young people come of age, and 64 is the age that many begin to consider their legacy," explains Sharna Goldseker, vice president of the Andrea and Charles Bronfman Philanthropies and director of 21/64.

"Initially the transfer of wealth was looked upon as something like the passing of the baton. But with expanding life expectancies and with individuals active for longer periods of their lives, often, instead, we have boards that have multiple generations sitting around the same table making decisions together," Goldseker says.

Goldseker believes that young philanthropists need access to peers in similar situations to develop a vocabulary of giving and to better understand their own values. Many similar questions arise. For example, she says, "What does it mean if my grandparents and parents are interested in giving money away to one issue, and I want to do it in another way? What if I want to honor my family's legacy but still support organizations they haven't previously supported or considered?"

## Tools for Intergenerational Philanthropy

To foster productive discussions between the generations, 21/64 developed a useful tool, a deck of 25 cards, each printed with the name of a different value. Young philanthropists were asked to take the deck and rearrange cards like "justice" and "compassion" in order of their personal importance. "The cards were intended as a resource for members of Generation X and Generation Y, but they have proven a terrific resource beyond this original intent," observes Goldseker. "They give a shared vocabulary to help discussions between all generations."

As the young philanthropists returned to their families, they were able to talk meaningfully about what they wanted from their charitable giving. Parents and grandparents were more responsive to their interests because the children had invested real thought in the decisions, and all family members could use the card exercise to find common ground.

## Overcoming Tension Between the Generations

Two families--a father and son from one; a mother and daughter from another--were brought together at a Community Foundation for the National Capital Region conference in 2005 to explore the intergenerational transfer of wealth. Because the families represented different ends of the socio-economic spectrum, the organizers anticipated that their concerns would differ as well. But the discussion surprised them.

The father planned to transfer several million dollars to his son. The mother was only able to give a fraction of that to her daughter. Yet both parents expressed concern about ceding control of their finances. Both fretted that the children might use the wealth to pursue philanthropic causes that reflected passions other than those motivating the parents' charitable giving.

"We found a consensus of opinion," says Kenny Emson, senior vice president of development and donor services at the community foundation. "The 60 different donors sitting in the room turned out to share these precise concerns."

When differences over charitable giving arise, tensions are an inevitable result. But families that take time to discuss these issues openly and honestly often find that they come together in unexpected ways. Such discussions should always begin with a careful reflection on each individual's core values, Emson says.

## Teamwork Improves the Experience

While the growth of interest in intergenerational giving has created some tension between the generations in how charitable money will be spent, the key is for all parties to take stock of their values and passions and to engage in frank and open discussion about charitable intent. In this way, many families have overcome generational challenges and found themselves more satisfied as a result. "We see multiple generations at the table together making difficult decisions," Emson says. "The best situation is when we see families come together over their philanthropic interests."

## Additional Resources:

[www.changingourworld.com](http://www.changingourworld.com)

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[www.cfncr.org](http://www.cfncr.org)

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