

# Family Philanthropy

**A family that gives together shares their values, strengthens bonds and creates memories that last a lifetime.**

## CASE STUDY: FAMILY PHILANTHROPY

### Family Defines Its Giving Across Generations, Interests and Time Zones

Having learned about the **California Community Foundation (CCF)** through their investment counselor, a family of four decided to open a donor advised fund. The investment counselor brought CCF to the table to simplify and clarify a process for each family member to participate in philanthropy.

The parents and their adult children had a variety of philanthropic interests, including the environment, education and health. As a family, it was important to discuss values, goals and giving priorities to make sure everyone's passions and interests were considered.

CCF first helped them explore what their vision and objectives for giving were. After the initial discovery conversations, CCF guided a process to develop their mission statement and priority areas for their grantmaking. Conversations like this with one person are in-depth and require a great deal of time and thoughtfulness, so imagine the added layers of complexity when including an entire family living in different parts of the world. Conflicting priorities, personalities and time zones all needed to be navigated, but CCF with its decades of experience was the ideal philanthropic navigator.

#### Leveraging Grantmaking Experts

Throughout the entire process, a dedicated CCF team of industry experts were available to answer additional questions and served as thought partners as the family

explored their areas of interest. CCF's program officers, who have specialized knowledge of health, environmentalism and education, hosted a call with individual family members regarding the issues that concerned them.

Based on those calls, the CCF team was able to identify specific nonprofits with unique approaches to improve education, health and the environment, including the creation of K-12 learning environments that incorporate the elements of a liberal arts education, impacting business practices through an environmental lens and the use of epidemiology to fight disease.

Next, the nonprofit selection was clarified by establishing a series of criteria defined in conjunction with CCF. For example, the family was committed to ensuring any nonprofit receiving funds was sustainable and offered services on a national or global scale.

#### Making Informed Choices Based on Best in Class Nonprofit Research and Analysis

To give the family total confidence in their grantmaking choices, CCF provided extensive, detailed background information and analysis on each potential nonprofit.

Grounded in a six-month process of research and refinement, the CCF team provided a finalized list of suggestions to the entire family. Ultimately, the family agreed on funding seven organizations that honored the



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variety of interests and social concerns of each family member.

By creating the family run donor advised fund, CCF helped them discover the joy of giving through the support of the foundation's comprehensive suite of charitable services. What was once considered a difficult process has been simplified. Today, the entire family looks forward to the next teleconference call or group chat to confidently plan out their next round of grants.

When it comes to the special and personal considerations that arise with family philanthropy, we're adept at developing a plan to honor every member of the family — including opportunities for new generations to engage in charitable endeavors now and succession plans for family funds into the future.

A family that gives together shares their values, strengthens bonds and creates memories that last a lifetime. Our giving experts can work with your clients to ensure their children and grandchildren create a tradition of impact.

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Please feel free to contact your Relationship Manager or the Donor Relations Team at [donorrelations@calfund.org](mailto:donorrelations@calfund.org) if you have any questions. We are here to help.

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