

How to Engage Your Family in Philanthropy

Philanthropy and family are two areas where donors can leave a lasting impact on the world. Many donors want to share their charitable passions with their loved ones and to teach them about the values that make philanthropy so important—and so exciting.

Bringing family together around philanthropy can be deeply rewarding. It is a chance to connect and converse about deeply personal values, to work together to affect the common good, and to learn about one another. While there are many ways to have these conversations, here are a few principles and guidelines that may help you along the journey to making philanthropy a family affair.

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Determine Who You Want to Involve

Involving multiple generations in your philanthropy can help to create a legacy of giving for your family for years to come. When determining which family members to involve, consider not only your children, but also grand-children, in-laws, and other extended family.

Tailor to Ages and Stages of Life

There is no single right time to introduce your family to ideas about philanthropy and giving, but whenever you do, bear in mind both their developmental stage and the range of competing demands they face.

- **Young children (early teens and younger):** Lean towards activities that are concrete and easy for youngsters to understand, like giving toys or clothes, or serving food. Ideally, let them see the impact they make on other people.
- **Late teens/early adults (late teens to early 20s):** Look for opportunities that let them do activities with their peers, investigate and draw conclusions on their own (like site visits), and even sit in and contribute to decision-making.
- **Full adult:** Be mindful of the other demands that their life may be placing on their time, from career, to love, to families of their own. Find a level of engagement that fits their schedule.

Start a Conversation with a Goal in Mind

What are you hoping that your family member will take away from the conversation? Do you want to awaken a spark? Fill them in on what you're up to and why it matters to you? Or invite them to join into the process?

- **Inform:** Tell your family what you are doing and why, and why you feel that it is important for them to know about it. Be sure to let them know if some part of your philanthropy will affect them in other ways, such as changed spending patterns and altered inheritance, and let them know why you feel this is the right decision. Invite their comments and questions and answer as forthrightly as you are able.
- **Inspire:** Start with something personal and emotional—a story from your own experience or the moral convictions close to your heart. Then let them know what you are hoping this leads to and why—maybe you are starting a fund for them to start their own philanthropy, or maybe you are taking a prominent public stance or honor that will bring attention to the family. Invite them to offer their reactions.
- **Involve:** Explain the situation you are inviting them to join—what your goals are, what structure or programs are already in place, what your role is—and the role that you hope that they will play. Be prepared for negotiation, feedback, and give-and-take, and be prepared for them to have their own ideas about their involvement going forward.

Family gatherings or holidays can be a great opportunity to engage in these conversations.

California Community Foundation is always eager to work with you in engaging your family about philanthropy, drawing on over a century of experience.

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

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Engage Them on Their Own Terms

You are probably starting this process because you are passionate about philanthropy, but you will have the biggest impact on your family, and ultimately on the world, if you are able to spark their passions as well. That means encouraging them to find their own meaning in philanthropy and to take ownership of it.

- **Try to meet them where they are.** Some family members will have strong ideas and opinions about philanthropy and how to make an impact. Others may not have given the subject much thought, or even know where to start. Take cues on whether they need autonomy or encouragement, guidance or space.
- **Encourage their interests.** One of the most straightforward ways to do this is to set up a fund from which they can make their own donations. This could be a separate DAF or a portion of your own, or some other vehicle. Or it could mean giving them a greater say in decisions about joint family philanthropy. Either way, the goal is to help them find their own philanthropic voice.
- **Find things you can do together and apart.** Philanthropy is a chance to collaborate and to connect as a family over shared values, and it is a chance to make one's own way as an individual in pursuit of a personal vision. Make space for both shared and separate experiences, and you may find that the two end up influencing one another.
- **Always leave the door open.** Philanthropy can be an exciting way to connect, but the moment may not always be right for connection, for any one of a thousand reasons. That doesn't mean the time won't come down the road. If you and your family member don't find common ground, let them know that this is a conversation you're glad to revisit whenever they feel ready. If they don't seem interested, give them space, but don't give up. After some time, find another opportunity to see if their perspective has shifted.