A close-up photograph of a person's face, focusing on the eye and forehead area. The image is overlaid with a semi-transparent teal color. The text is positioned on the left side of the image.

# ENGAGING GENERATION IMPACT:

**BEST PRACTICES  
FOR FAMILIES**

By Sharna Goldseker and Michael Moody, co-authors of  
*Generation Impact: How Next Gen Donors Are Revolutionizing Philanthropy*

This Best Practices Guide builds on the research and analysis presented in *[Generation Impact: How Next Gen Donors Are Revolutionizing Giving](#)* (Wiley, 2017), by Sharna Goldseker and Michael Moody. The Guide was prepared by Heidi Toboni of HeLT Consulting with the co-authors of *Generation Impact*. Portions of this guide are excerpted or adapted directly from the book. For more information, visit: [www.generationimpactbook.org](http://www.generationimpactbook.org).

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# INTRODUCTION

## Why Family Engagement of Next Gen Donors Is More Important Than Ever

America's next generation of major donors, those currently in their thirties or younger, will have an enormous impact on society, as people like Andrew Carnegie and John D. Rockefeller had in years past and as people like Bill and Melinda Gates and Warren Buffett are having today—potentially even *more* impact. These “next gen donors”—Millennials and young Gen Xers who are either inheriting philanthropic opportunities or earning their own substantial wealth and becoming interested in giving—will decide in the years to come which diseases get the most research funding, which environmental organizations launch the biggest awareness campaigns, which new ideas for education reform are incubated around the country, and more. Those decisions will impact—directly and daily—our health, our communities, our economies, our culture, and even our climate.

### The Most Significant Philanthropists Ever

In fact, if current trends in wealth and giving continue, these rising major donors will be the biggest, most significant philanthropists ever. They will have historically unprecedented financial resources at their disposal, given the rapidly increasing wealth concentration in the U.S. and the estimated \$59 trillion wealth transfer across generations taking place over the next four decades (with an estimated \$27 trillion of that eventually going for charitable purposes). But these next gen donors also have big plans for how to wield their financial power. Simply put, they want to change giving in ways that will fundamentally transform philanthropy. And they want to do so now, rather than wait until they accumulate all the wealth they can and retire to a life of philanthropic leisure.

This means that Gen X and Millennial members of philanthropically minded families will be the ones to carry on family legacies of giving, stewarding giving traditions and vehicles into the future in unique and powerful ways. As these rising donors' family members—or as staff working with them—your support and guidance are critical. The good news is that the next gen want to learn from and with you, and give alongside you, to help the family make an even greater impact through giving.

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**NEARLY \$60  
TRILLION IN WEALTH  
IS TRANSFERRING  
THROUGH FAMILIES  
TO THE NEXT GEN;**

**\$27  
TRILLION  
IS ESTIMATED TO  
GO FOR CHARITY**



### How to Use This Guide

Our goal is to help you engage, guide, and learn from the donors we call “Generation Impact.” How can you best prepare next gen donors to take on these imminent philanthropic responsibilities? Building on the research and analysis presented in our book, *Generation Impact: How Next Gen Donors Are Revolutionizing Philanthropy* (Wiley, 2017), this guide offers specific ideas and implications for working closely with your next gen. It provides best practices and highly practical takeaways for engaging and supporting next gen donors as they figure out their philanthropic roles and prepare to launch their own giving efforts.

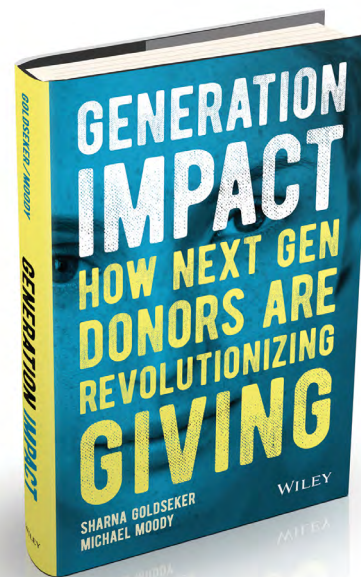
We’ll summarize how the next gen learn best, and who or what influences the development of their values and interest in—and approaches to—philanthropy. We’ll review our most relevant themes, data, quotes, and findings for families and those who work closely with them, and then build on that with exclusive new content.

Our hope is that you will discuss these best practices within your families, foundations, and teams and then take action, as your action is what will ultimately fulfill the primary goal of our research: to help us all capitalize on the tremendous potential of this rising generation and their historic opportunity to move the needle on the world’s most pressing problems.

### Next Gen Donor Research & *Generation Impact*

The best practices in this guide are derived from years of both formal research and directly engaging with these game-changing new givers. We have completed two rounds of research since 2011, surveying 310 major next gen donors and conducting 75 qualitative, in-depth interviews, all while continuing to work deeply with next gen donors and multi-generational giving families. We have also continued to talk about our findings with those on the front lines of philanthropy and fundraising.

The first phase of this research resulted in our report *#NextGenDonors: Respecting Legacy, Revolutionizing Philanthropy* (2013). The second phase culminated in the book *Generation Impact* (2017), which paints a detailed picture of what the philanthropic footprint of next gen donors will look like in the U.S. To make the most of the practical advice found in this guide, we recommend you read the book as well. (To read the initial report, download a complimentary discussion guide for individuals and groups reading the book, and more, visit: [www.generationimpactbook.org](http://www.generationimpactbook.org).)



### Helping the Next Gen Form Their Philanthropic Identities

What we learned through our research is that next gen donors respect family legacy, continue to give to similar causes as previous generations, and give for similar values-based reasons. But they are also eager to revolutionize philanthropy to be more effective, hands-on, and networked. They want change, yes, but only so philanthropy can become a catalyst for addressing persistent social problems (thus the moniker “Generation Impact”). They want to honor the past while improving the future; we can all breathe sighs of relief!

They take their roles as major donors seriously, and they are eager to be taken seriously—by their families first and foremost. They are figuring out who they are as donors even as they figure out why and how to give. They are eager to become the donors they want to be, asking themselves questions like: *What do I value? What issues do I care about?* and *How can I affect change?*

As they emerge into adulthood, the identity challenges they face—challenges of individuation, becoming, and launching—are universal. But for these emerging adults in particular, the privileges and responsibilities of wealth and/or philanthropic stewardship add another nuance—some would say a greater weight—to their journey. These next gen donors are at a pivotal stage of both personal *and* philanthropic identity formation. They can use all the help they can get.

Like all parents, parents with wealth and philanthropic resources are concerned with raising their children to be healthy and productive members of society. But the process of philanthropic identity formation among these next gen donors is especially significant—not just for parents and grandparents, or even just for the field of philanthropy, but for everyone affected by their major giving in our world. If this stage of identity formation is so important, what can we do to foster it?

Your challenge is to give your next gen family members quality learning experiences around philanthropy, guidance and autonomy to help them launch, a tradition to step into, a dialogue around shared values, and the support and respect needed to work successfully alongside them. The eight best practices described in this guide outline behaviors we hope will enable you to help your next gen to form their own philanthropic identities and to make the most of their upcoming opportunities.

BEST PRACTICE #1

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Start early.  
Give your next gen opportunities to give, and to observe the family's giving, from a young age.

Early exposure to philanthropy is our top recommendation for fostering the philanthropic identity of next gen donors. Whether this means providing children with the opportunity to give and volunteer or to watch you do so—or both—early exposure is a crucial step in character development. And it's the sort of experience the next gen actually crave.

While next gen donors like to learn from their peers and use the web for information on causes and organizations, they still consider *experiential* types of learning the most powerful and influential. Observing parents, grandparents, and other family members giving is the second most important source of learning.

This means that even in an age of hypernetworked lives, our children learn about philanthropy primarily from direct experiences—such as making small donations from a young age—or from observing firsthand the philanthropic activities of family members. Even sitting in on a board meeting of the family foundation can make a difference. In fact, the next gen find the influence of observing older family members even more significant than direct teachings about philanthropy.

“It was all learning by example. Our [foundation's] board let us sit in on board meetings from whatever age we wanted, as long as we could behave ourselves and not completely disrupt anything. Getting to observe that process helped me a lot, because it wasn't so abstract.”

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**NEXT GEN DONORS  
TOP 2 INFLUENCES ON  
DEVELOPING PERSONAL  
PHILANTHROPY:**

**1.**  
**PERSONAL  
EXPERIENCES AS A  
DONOR, VOLUNTEER,  
BOARD MEMBER, ETC.**

**2.**  
**OBSERVATIONS OF  
THE PHILANTHROPIC  
ACTIVITIES  
OF PARENTS,  
GRANDPARENTS,  
OR OTHER FAMILY  
MEMBERS.**



### “The Sooner the Better” When It Comes to Introducing Your Next Gen to Family Giving

Vital character development takes place well before emerging adulthood, so earlier is better when it comes to introducing your next gen to the concept of philanthropy. Next gen donors talked happily of “growing up on the floor of the Junior League meetings” and being exposed to giving “ever since I was zygote.” “These experiences, at an age when my mind was still forming, have completely shaped my view of the world and my priorities,” attested another.

Consider what’s at risk: if you wait to engage your next generation because you don’t want them to know about your wealth or significant donations, they may only see the material aspects of your life (house, cars, jewelry, schools, travel) or hear the more mundane topics you are willing to discuss. Rather, be a source of learning for them through intentional conversations, experiences, and observations. These discussions don’t have to be focused on dollar amounts; talk instead about the significance of giving to your family and the impact it can have on the world.

A next gen donor who experienced a positive early introduction to family philanthropy suggested that elders “ease [young children] into it” with small activities for “getting the ball rolling—even if it’s just a little community service day or those kinds of things that get [kids] in the mindset.” Doing so takes them out of any bubble of privilege, and expands their understanding of the need for philanthropy.

“Volunteering at the domestic violence shelter and understanding, *wow, this is real; this isn’t playtime; these are people’s lives.* [It was] those early experiences and my parents really helping us to understand how other people live that [clarified] we have a responsibility to give back.”

### Allow the Next Gen to Watch You Give

A simple starting point is to let the next gen observe you giving. Allow them to shadow you, for example, at foundation meetings or while visiting a potential grantee organization. One donor shares how watching his mother at foundation board meetings developed into his own sincere interest and commitment:

“I have been a full voting member since I was 21—so for three years—but I have been going to meetings consistently since I was about 18. I went to a few before that. I think I went to my first when I was about 11 or 12. Had no idea what was going on. I was sitting there going, ‘What is a 501(c)(3)?’ But, having grown up with my mom really talking to me about philanthropy, and always having been involved in volunteering, I sort of got how it worked. Mom had said, ‘Hey, let’s take a trip and you can come and sit in.’ So, I went to this meeting and I think I spent half the time drawing, but it was a good introduction.”

Next gen donors not only learn from but are inspired and motivated by these kinds of observational experiences.

### Provide the Next Gen Opportunities to Begin Their Own Giving Early

Even more meaningful learning comes from actually doing, versus seeing, and the next gen donors in our research often pointed to their own early experiences with giving and volunteering as a main reason for their passion and comfort level with philanthropy as adults. In fact, 98% said they were giving their own resources by age 30, and 51% in their teens or earlier. And 95% had volunteer

**MAJOR NEXT GEN DONORS ARE GIVING AT A YOUNGER AGE:**

**98%**  
**GIVE BY AGE 30**

experience before they turned 21. Also, it's not just inheritors who give early and often; earners also have an urge to "give now."

You can provide your next gen with the means to give, which absolutely includes giving the resource of their time and talent through volunteering. We recommend you re-read Sara Ojeh's feature in *Generation Impact* (pages 247–256) for concrete ideas on how to approach this. One way is to give your next gen the autonomy and responsibility to donate a specific amount to issues of their choosing. One younger donor lauded an early opportunity to give "grandchildren's gifts" of \$100 or \$500 to organizations they could "find meaning and impact in." Another suggests starting small but purposefully, perhaps around the dinner table:

"We actually are very intentional with our kids about this. Every Friday night we have a family dinner. One of the blessings we do is just thankfulness and appreciation for where we are. Then, as part of that, we always put money in a tzedakah box and say that we feel thankful, and when the tzedakah box fills up, our son decides where it goes."

Whatever you choose, put in place some "gating mechanisms" to ensure your next gen take these opportunities seriously—and give them access to help and advisors if needed. Within these more controlled, manageable scenarios, the stakes are lower if your next generation falls short. As one next gen advises families, "If you fail, you fail. It happens. [But] give the kids agency. Let them do their own research and let them figure it out. Don't judge." These direct giving experiences will better prepare your next gen for a future when more is on the line. "I think it prevents some of the little mistakes that you make when you start out [working with a larger foundation], because we [previously] did it on a smaller scale with some guidance."

By starting your next gen early and giving them some autonomy, you increase the likelihood that they will develop a passion for philanthropy and maintain their involvement throughout their lives. "What stands out most to me [is] the importance of philanthropy and service being something that shapes your life, plays a very important role, rather than just something that you tack on as an afterthought."

### PUTTING IT INTO ACTION

- From a young age, help your next generation to understand the value of philanthropy—whether it's modeling regular gratitude and giving, volunteering together, or something as simple as providing them with two piggybanks, one for money they set aside to give and another for money they save or spend.
- Take your next gen along when you volunteer.
- Invite them to sit in on family discussions—in the foundation board room or elsewhere—about philanthropy.
- Follow up your philanthropic actions with honest conversation about what giving means to you personally and how your family wants to make an impact in the world.
- In addition to allowing your next gen to see you give, consider setting them up in a "giving mentorship" with an elder family member, advisor, or close staff person who can answer their questions and support them.
- If your family has a foundation or donor-advised fund, then introduce your children to staff or advisors to begin an open and communicative relationship at an early stage.

BEST PRACTICE #2

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# Move your next gen from the “kids’ table” sooner, not later. Embrace the multigenerational family team.

The flip side of starting the next generation early down this philanthropic road is that, once involved, they will expect to graduate sooner from the “kids’ table” to the main family funding table. They’ll want to see a career trajectory and find meaningful roles in the family’s giving—and not wait until the older generations retire to get involved. We encourage you to turn this into a positive.

## Harness the Eagerness of Generation Impact and Show Them a Way In

Gen Xers and Millennials expect to be involved in philanthropy—both their own and their families’—earlier than previous generations. “My grandparents got people involved in this [work] at a very late point. My parents’ generation getting us involved [younger] was a change of direction. That was different—which I think we all deeply admired and respected.”

They yearn to pursue their own preferred ways of doing good, and with their eagerness comes a clear expectation that an invitation to the family giving table is imminent. In our survey, 41% of next gen donors got involved in their family’s giving in some way before they turned 21, and 88% by the time they were 30. Looking to the future, more than half expected to be “very involved” in the family’s giving, and another third said they’d be at least “somewhat involved.” However, for most surveyed, their level of *current* involvement lagged behind their level of expected involvement, and many told us this bothered them – especially if they didn’t know when that gap would close.

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**41%** OF NEXT GEN DONORS GOT INVOLVED IN THEIR FAMILY’S GIVING BEFORE THEY TURNED 21

**88%** GOT INVOLVED BY THE TIME THEY WERE 30

We strongly encourage you to capitalize on their eagerness and youthful energy to further the goals of your family’s giving. *Not* allowing them into the family giving process earlier than previous generations can lead to uncertainty and frustration. We heard this echoed across our research. This donor, who gives personally but is not involved with the family foundation, lamented:

“I think the more you tell somebody about something, the more excited you get them. If you’re not ready to [say], ‘You can be on the board,’ or ‘You can have some kind of active role,’ you alienate them. I have become more and more disillusioned with even the idea of ever wanting to be on the family foundation.”

In many families, of course, some version of a “kids’ table”—real or metaphorical—is the first step in involving the next gen, allowing them to observe family giving decisions and/or make their own decisions about some designated resources. This is fine, unless the next gen feels stuck there for too long or can’t see a clear way forward for them in the family. This donor explains the “career path” his family laid out for him:

“To become a member of the board of our family foundation, we had to be gainfully employed and show immense interest in what we were doing. We had to observe on a board of advisors for a year to show that we were eligible and committed to doing the work that needs to get done to give away that money.”

Another recalls:

“It was an honor to have a budget from my family foundation and the responsibility to allocate \$20,000 out of college. I took it seriously and learned a lot. I’d encourage other families to bring their next generation in early and give them some autonomy. It instilled pride in me to be able to be involved in an organization that I chose to support myself.”

Another donor explains why having a clear path and early stages of involvement is best for everyone, “I know when our parents just jumped from doing their own work to being on the board, it was a huge adjustment for them.... But, for us I think it will be an easier transition.”

FEATURED  
NEXT GEN DONOR

ZACH WHITTEN

*Zach Whitten was introduced to philanthropy at an early age as part of the next generation of the Lumpkin Family Foundation based in Mattoon, IL. He now teaches computer science at Virginia Commonwealth University.*

***On being introduced to family philanthropy at a young age:***



How we learned was definitely hands-on. I was age ten when I started getting involved. The adults gave us our own thing. It was my thing: I researched a nonprofit. I proposed it. And I was able to give it money. That was all on me. And also, they included us in a lot of the conversations about the bigger grants. Everyone would respectfully listen. It was a really hands-on experience, because I could be there, and I could listen, but it didn’t feel like I was getting dragged along and forced to sit in the corner while the adults did business. [I learned] just the idea of looking at their books, asking, “Well, where does the money go? Does it all go to salary for ten people?” To even think of checking out a philanthropy’s books—that seems so natural to me. If I hadn’t been involved with [philanthropy] as a kid, I would never be doing this. Being engaged at a young age has been the reason why I’ve stayed involved as I got older and busier.

Again, failing to provide a clear path in the family or hope of allowing your next gen to move soon into a full adult role can lead to frustration. One next gen donor described the lack of clarity about her family's intentions, "Do they want me to participate—or am I being parked at the kids' table?" She felt her family was sending mixed messages. She had complied with their goals for her—graduating college, finding a job, and attending philanthropy conferences for a few years—but they still had not invited her to participate on the foundation's board. She was left wondering what else she had to do to "prove [her] worth."

We realize some parents and grandparents worry about involving the next generation in the family's giving vehicles. However, our study shows that we should embrace the idea of giving next gen donors the "keys to the car." In fact, respect for their predecessors leads the next gen to be responsible stewards of family legacy and philanthropy, even if they want to reinterpret giving in ways they believe better address today's challenges.

### Embrace the New Paradigm of a Multigenerational Team

Part of the reason the next gen is so eager to get involved, and then to move quickly from the proverbial kids' table to the adults' table, is that they want to be part of a multigenerational team. In fact, in philanthropy more broadly, multigenerational teams are becoming the new paradigm. People are living longer, with multiple generations of adults active at once. Family funds and foundations today can involve as many as four generations.

It no longer makes sense to think in terms of "passing the baton" from one generation to another. And besides, the next gen doesn't get the relay race metaphor. They want to be on teams where rookies learn from veterans, where each generation brings their own skills to serve the whole, rather than waiting for the first runner to pass the baton. In fact, in our study the overwhelming majority of next gen donors said the most important influences on their giving were their parents and grandparents. They want to learn from you, but they want to do so as part of the same team.

So, be the veteran on your family's multigenerational team; give the next gen your wisdom and experience, but be sure to also embrace what your next gen children (aka adult children) have to offer. If we don't engage our next gen until we're ready to retire, we risk them spending decades hanging out on the fringes unproductively or disengaging entirely and taking their ideas and talents elsewhere.

Just be ready for change when you say yes to this multigenerational team. While most families and foundations assume they can add a next gen donor, even a young one, into an existing system and have it remain status quo, they soon discover that the whole system naturally has to adapt to integrate a new family member. Some elders may feel they have to relinquish control to make room for next gen to join the board table, but the better approach is to create an inclusive entity that is greater than the sum of its parts.

### Mutual Respect and a Sense of Peerage

As multiple generations give away philanthropic resources together, they move from being parents and children toward becoming peers in decision-making processes. Dr. Stephen Treat says cultivate "peerage" by listening with

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an open mind and extending the mutual respect and trust that must accompany independence. One young donor explains how this respect comes from recognizing the contributions of all team members:

“A lot is achieved when the next generation is able to respect the older generation’s wisdom and experience and the older generation is able to respect the next generation’s ability to question worlds and deeply think about things, even if they might not have the technical vocabulary of doing it for 30 years.”

Older family members need to value the next gen’s unique talents, experiences, and gifts. Many of the next gen donors in our study emphasized how they are more knowledgeable about trends and new ways of giving. Early training in volunteerism and giving can make them more eager, and arguably better prepared, to take on de rigueur philanthropic responsibilities. In today’s fast-paced Information Age and global sharing economy, families and foundations that don’t look to next gen adults with twenty-first-century skills to join their teams can be left behind and fail to flourish.

### PUTTING IT INTO ACTION

- Shift your thinking, planning, and communications from sequential, or relay style, to inclusive and multi-generational. See your next gen as playing different positions on a team based on mutual respect and equality.
- Consider setting aside a portion of the family’s philanthropic resources and giving control over that portion to next gen family members. Take this process seriously and invite them to explain to the family how and why they made their giving decisions.
- Don’t give the appearance of disingenuousness. As much as you may encourage and train the next generation to engage in family philanthropy, if you are not opening any board seats in the near future, it matters little. Show your next gen a clear path and timetable for formal participation in the foundation and a seat on the board.
- Choose an age at which next gen adults are eligible to join the family’s main decision-making body. Advertise that rite of passage to all involved.
- When adding members to a foundation’s board, be sure to set aside time for a board or organizational retreat to orient the new members and to discuss the opportunities and challenges at hand.
- Invite board members to attend a Board Certification training at the Johnson Center for Philanthropy or the PJSF x 21/64 Board Leadership Course.
- Assign buddies within the foundation or family to help acclimate the next gen to their new roles in the organization during their first year.
- Talk about and understand generational differences. Consider the events and conditions that influence each family member and how different generational perspectives may inform the same funding strategy.
- Establish group agreements for how the family will navigate differences of opinion as they arise.
- If needed, seek the help of professional advisors and facilitators to develop an effective multigenerational process for your family’s philanthropy. You can find a list of nationwide advisors and facilitators at [www.2164.net](http://www.2164.net).



BEST PRACTICE #3

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# Show your next gen the impact of the family's giving.

As you set your next generation on a philanthropic path, be sure to show them the impact of your family's giving. We call these younger donors "Generation Impact" for good reason—*impact* is what engages them most. In our research, next gen donors spoke obsessively of the need to see the impact of grantee programs directly and to know they are moving the needle on change. We recommend "The Power of Seeing" section in Chapter 2 of our book for a discussion of how the next gen define impact and some practical examples of how to show it. As we've mentioned above, direct experiences will be the most influential:

"Meeting the people directly that have benefited from [our grants] was a really profound experience. [It was] something that had me thinking about how you learn and educate yourself and connect with the philanthropy that you are doing day-to-day, month-to-month. One of the differences I see between generations is that the younger generation has an interest in what I think the older generation has less of: in hands-on experience of confronting issues, people, and things that need help in these situations. Face-to-face. It is a very different form of education and exposure, and learning and collecting information, than presenters and speakers and conferences and things like that. I have the sense that there is a desire and a need for more direct contact with these things in the younger generation."

This kind of "seeing" helps next gen donors "feel most comfortable supporting" a family's traditional charitable interests. Even if you are guiding next gen of a much younger age, show them the impact of your philanthropy. As this next gen donor and young parent states,

"At the age our children are at, which is five and three, we are intentional in making them aware of these organizations. We take them there. They physically understand what it is. We talk about how these are places that do really important things for people who don't have as much as us."

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NEXT GEN DONORS NEED TO SEE

**THE IMPACT  
OF GRANTEE  
PROGRAMS  
DIRECTLY**

**AND TO KNOW THEY  
ARE MOVING THE  
NEEDLE ON CHANGE.**

## Help Your Next Gen See the Need for Your Family's Giving

In addition to showing your next gen how your giving makes a difference, we recommend exposure to the very real needs that exist in our world. Go on site visits where next gen come face-to-face with needs you hope to support, rather than abstractly discussing issues “sitting around the board table in a Manhattan office.” Take your children on learning journeys, like John R. Seydel describes in the sidebar here and in *Generation Impact* (pages 179–181).

In some ways, this is simple. As one donor we interviewed put it, it's “just exposure, exposing your well-to-do kids to the other side of the tracks, so to speak, with regularity to some degree.” Other times it may require a bit more intention and communication on your part. “It's *intentional* exposure,” stresses another:

“Parents need to have that intention while they're exposing them. I've been on trips, I've been to places where people see the same things as you, but we internalize it very differently. I think the parents themselves need to want their kids to be exposed in a way that they're thinking about it.”

Arranging volunteer opportunities for your next gen is another way to show need and the impact they could have on the lives of others. This next gen donor shares how a visit to an orphanage at a young age ended up being “transformative.” The donor witnessed firsthand orphans who were neglected simply because the organization was overburdened, which eventually led to a grant.

“I had this really incredible kind of self-actualization experience, where it seemed like if all these planets hadn't aligned—if I hadn't happened to volunteer with that program, and if I hadn't happened to go on that trip, and then hadn't happened to have written that letter, and then if that grant hadn't happened to have gone through—then things would be radically different for these fifteen orphans. So it demonstrated, in a very real way, the power that you can have just by *getting out there*. That was what really got me interested in philanthropy and the [family] foundation.”

### FEATURED NEXT GEN DONOR

## JOHN RUTHERFORD SEYDEL III

*John R., the oldest grandson of Ted Turner, is a member of the Turner Foundation's third-generation junior board and is featured prominently in Chapters 8 and 9 of Generation Impact. Here he shares some additional advice.*

### *On Showing the Need for and Impact of Family Giving:*



Show [your next gen] what the world is really like outside of your state or outside of U.S. borders. That is probably the biggest recommendation I can offer. Have a time of the year where—whether it's a reunion or whatever—you go together to experience a different part of the world and its people. Whether it's a developing nation, a place that you are trying to protect, or somewhere that you are giving money to, go see what's happening. Go to see the actual impact on the ground. See the people whose lives you're making better, especially as a family. Because, that's really the part that makes it all worth it. Ideally we're even rolling up our sleeves and working with the communities we're investing in, which makes it so much more rewarding and inspiring. And that really helps give us [the next gen] the feeling that we are part of the solution. We're not just giving money; we are trying to be an active part of the solution.

## When Your Next Gen Don't Live Where Your Family Gives

Local experiences are especially important if your next gen are geographically dispersed from where your family's giving has traditionally been focused. In fact, this is one of the biggest questions we get asked by philanthropic families: *What do we do when our next gen don't live in the same area where the family foundation gives?*

Many next gen donors have moved away or have never lived in the family's areas of focus and can have a tough time getting personally engaged in the issues. They may be more interested in giving to their own communities and to needs they are confronted with more regularly—or to national or international causes, given our highly connected, globalized world. You will need to provide your next gen with additional, planned exposure to where the family funds.

The news on this is encouraging, however: Surveyed next gen donors say they are amenable to continuing place-based legacy giving. This is in part because, as we show in Chapter 9 of *Generation Impact*, the next gen in giving families are deeply proud of their family's legacy—including the family's role as major donors in a local area. As one articulates, "The family business has been in my hometown for five generations. My generation is the first to leave and probably never move back, but I feel we should still support the town in some ways." Nurturing that connection is the key.

A next gen donor who did not grow up in the community where her family gives shares how she and her cousins found proactive, direct efforts to learn the needs of that community extremely helpful—to "get in a van and drive around and see what the needs are." Once family narratives are shared, most next gen can get on board with giving back to "where the money was actually made and created." Many also find these learning trips and events with extended family members "nice to keep us focused on something that we all love and care about [together]" and they appreciate "not splintering the focus of the foundation."

By making the effort to show the impact of your family's giving and helping your next gen see the need for it, you'll be fostering their personal *and* philanthropic maturity. As this next gen donor explains,

"[I try] to understand the difference between being emotional and being effective. You can't go into the field and say, 'I want to take every baby home, or to give every person who asks five dollars.' That is not realistic and you have to learn that rationale for yourself. Nobody can teach it to you unless you go, see, feel, and understand."

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**ONCE FAMILY  
NARRATIVES ARE  
SHARED,  
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GEN CAN GET  
ON BOARD WITH  
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TO WHERE THE  
MONEY WAS  
ACTUALLY  
MADE.**

### PUTTING IT INTO ACTION

- Discuss as a family what impact on a cause or issue means to you, why, and what you look for to see evidence of that impact. Let each family member answer, especially the next gen who are just joining the family's giving.
- Help next gen donors feel more connected to the local impact the family has by giving them a chance to see the results of efforts through grantee reports, photos, videos, and other testimonials the family and/or their staff collect.
- Ask grantees for site visits on which you can bring your next generation. Let grantees know in advance who you'll be bringing and their ages. Let these organizations know that you'd especially like to see the impact of their programs and be open to discussing with all parties what these examples or measures of impact might be.
- If your family's giving is place-based, plan excursions to maintain a connection to that community, especially if your next gen no longer live there. Get out into the community and talk to people, asking questions and listening to their stories.
- Build in time for family members to spend together on these trips by pairing up cousins and family members who don't know one another so they can begin to cultivate relationships as well as learn about issues in the field.
- When appropriate, travel as a family globally to learn about other cultures and their needs, and how to approach making grants in order to impact entrenched social challenges.
- Organize quarterly or semiannual learning sessions where family members gather to learn about the issues the family supports and how they can deepen their impact.

BEST PRACTICE #4

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# Talk about your values and ask your next gen about theirs. You *will* find shared ones.

Values are central to everything about how next gen donors approach giving. We can't emphasize that enough. Next gen donors share with the general population of Millennials a strong desire for values-driven choices in all parts of their lives. As Justin Rockefeller explains in *Generation Impact* (page 186), this generation “already align their money and their values through their consumer choices and their employment choices,” so why would their giving be any different?

## Clarify Your Own Values First, Then Ask the Next Gen About Theirs

At 21/64, Sharna's team teaches the significance of what flight attendants advise before takeoff, “Please put on your own mask before helping others.” In other words, it is essential that parents and grandparents know and are intentional about their own values before they can have a deep conversation with the next gen about how to live one's values. This is also essential because values are what the next gen donors in our research said they learned most from their elders.

But it is also necessary to eventually ask the next gen about their own values. Don't believe the common media portrayal of “slacker” Gen Xers or “materialistic” Millennials. Work tied directly to personal values is a huge motivating factor for next gen donors, and they want to find ways to live their values through their giving and social investing. Talking about values will also help your next gen figure out their own philanthropic identity and personally connect to what they want to fund. It makes them better able to communicate to fundraisers and people wanting them to join their nonprofit boards, as well as to advisors and investors looking for values-aligned investing. And it makes it easier for next gen donors to discuss giving amongst their peers, which they love to do: “[I]n every giving circle that we have been a part of we have been encouraged to talk about values, because I think that is the foundation for a lot of giving.” When next gen donors are clear about their values, they have greater passion for and confidence in giving.

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**#1 REASON**  
**WHY MAJOR NEXT GEN**  
**DONORS GIVE: SUPPORTING**  
**A MISSION OR CAUSE THAT**  
**FITS WITH**  
**PERSONAL**  
**VALUES**

## Start with Values

Most families begin to involve their next gen family members by asking what they'd want to fund. While Traditionalists lived through an era of building institutions and Baby Boomers lived through seminal social change around causes they hold dear, Gen Xers and Millennials prefer to start with values. Whether they were influenced in their formative years by different historic events or they're focused on values as part of their identity formation, it is wise to start their integration into the family's philanthropy with a discussion of values.

Begin a dialogue around the values that inform the family philanthropy and invite your next gen to describe the values they hold dear. Ask where they learned those values and how they hope to implement those values into their giving.

You may be surprised (and they may be reminded) that they learned their values from you. One finding that surprises many people from our research is that 89 percent of next gen survey respondents said their giving was influenced by parents, and 63 percent by their grandparents. Inevitably, their values have evolved since then, but you will almost certainly find alignment in your values at the start of the family philanthropy journey. So, before diving into mission and funding areas, consider starting with values.

### WHO INFLUENCES NEXT GEN DONORS:

89% PARENTS

63% GRANDPARENTS

56% CLOSE FRIENDS

47% PEERS

## Aligning on Shared Values Helps You Align on Giving

While not all family members will share the same values, identifying a shared set of core values and a common language around values will enable your family to more easily and effectively make collective decisions. And this common ground of shared values can help your family navigate the more complex and sensitive aspects of giving together as a family. Unfortunately, many families focus more on differences in *what* various members want to fund—different program areas, causes, or grantee organizations—rather than move the conversation up, to one about values. Shifting the conversation will make it easier to address what might seem like intractable differences in cause or organization preference.

In cases where values just don't align, this is at least good information to inform a decision about how the philanthropy will function. You may consider not forcing collective giving and instead set up discretionary giving for different family members to fund differently. Some families set up different donor-advised funds or divide up a private foundation when they just don't see eye to eye on values. Those decisions are not made easily, but can enable the family to stay together.

Whatever your family's philanthropic values, we recommend that you translate your discussions into values and vision statements, jointly crafted that lives on the refrigerator, white board, or website, depending on formality of the family's philanthropy. Even if family members' missions or *what* they fund is different, values (and vision statements) can still establish a broad tent under which your family can give.



### PUTTING IT INTO ACTION

- Discuss values as a family, both yours and those of your next gen family members.
- Ask each of your next gen donors to share their values *before* you ask them what kinds of programs they might want to fund.
- Work to agree on a few core values that your whole family can rally around. Note that if you're going to begin to work together multigenerationally, then the family's philanthropy values should reflect everyone's values, not just your own.
- Ask people you interview to serve as professional staff for the family's philanthropy about their values to see how they might align with your family's giving.
- Consider whether your values are aligned in how you treat your staff, in your investment policies, and in the types of vendors you choose.
- Utilize value-clarifying tools, such as [Motivational Values Card](#) from 2164.net, and other resources on the market, in your next gen and multigenerational family meetings or less formally at family reunions and get-togethers.
- [Picture Your Legacy Cards](#) from 2164.net can be deployed to help families articulate your vision for funding.

## BEST PRACTICE #5

# Help next gen donors find their place in the family's legacy of giving.

For most next gen donors, the origin stories of their families and their family's giving inform how they see their own giving. As adults with considerable means, often in families with significant and perhaps even daunting philanthropic legacies, the question of their own giving identity feels weighty. Our evidence suggests that most next gen donors will take early cues from the stories and family traditions of giving that you hand down to inform their own philanthropic journey.

## Tell Your Next Gen Your Family Story—Both the Highs and Lows

When sharing your commitment to giving, the pivotal questions are: How can you best convey your family history of giving to your next generation? How can you have the courage to honestly explain the opportunities embraced and the challenges weathered? And how can you help your kin feel connected and humbly a part of an intergenerational family narrative that is greater than any one person?

Below we list some common ways philanthropic families share their giving histories. You can take confidence in knowing that by conveying family philanthropy stories—really, family history of any kind—you help your next gen with identity formation and self-esteem. Marshall Duke and Robyn Fivush of Emory University teach us the significance of family narratives on the next generation; their research found that those who knew more about the stories of their parents and grandparents demonstrated higher self-esteem and had a stronger sense of control over their lives.<sup>1</sup>

Here, a next gen donor poignantly talks of how a family elder's story provided him with a role model and was a means of passing on certain core family values:

“I definitely think humility has always been a value of our family. Our grandmother died when we were quite young, so we were not nearly as close to her as we were our grandfather, but many people who knew her talked about her tremendous humility.... She was a well-known figure, but she had

<sup>1</sup> As reported in Bruce Feiler, “The Stories That Bind Us,” *New York Times*, March 15, 2013.

tremendous humility and the ability to get down and dirty—to roll up her sleeves, to empathize with others. There was no arrogance in her character. She took seriously the endeavors she engaged in. And so, certainly role models like that have been great to provide an example for us on how we should carry our lives.”

Also, while you may be reluctant to share details of the family story that seem ugly or negative, Duke and Fivush’s research shows that sharing the highs *and* the lows is actually important for sustainment through tough times. They agree that the “oscillating narrative”—about weathering ups and downs over time and coming out stronger—leads children to develop a resilience as well as an “intergenerational self,” increasing their awareness that they belong to something bigger than themselves.

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**SHARING THE  
HIGHS  
AND THE  
LOWS  
LEADS CHILDREN TO  
DEVELOP RESILIENCE**

### Don’t Wait—Communicate Family Legacies During Your Lifetime, and Invite the Next Gen to Find Their Place in That Legacy

If specific causes, organizations, or gifts are of a significant size and importance to you, then it behooves you to speak with your children and grandchildren about your wishes *before* you pass. Don’t leave this to be read in a will or other legal document, when you can no longer answer questions and clarify your wishes. If you can communicate this in the context of a larger transfer of knowledge about the family narrative, your next gen will be positioned to be respectful of what you’re bringing them in on.

This doesn’t have to be an uncomfortable conversation; it can be a meaningful and empowering experience for both you and your next gen. If you can’t seem to find the right moment or simply don’t know where to begin, tools exist to help. Biographers, videographers, oral historians, and other consultants specialize in helping people to convey family narratives and transmit values and legacy down the generations. There are also advisors, such as Susan Turnbull, Eric Weiner, and Elana Zaiman, who help write “ethical wills” and “legacy letters” that go beyond financial matters.

As you share your family story and legacy wishes, you should also invite your next gen to find their own path within it. This is important for their integration into the larger family philanthropy; it will encourage them to take ownership of their chapter in the family narrative and will help them as they discern their own philanthropic identity. Discuss with them which of your wishes you want followed to the letter and where there is room for interpretation and innovation to adapt to the times. Help them see how their own goals and passions and ideas can fit into the family story—and where they can take it to the next level.

Katherine Lorenz’s feature in *Generation Impact* (pages 220–228) gives a detailed example of how legacy conversations with her grandfather played out, from her perspective as a next gen donor. In our research we talked to many donors like Katherine who were both eager to learn about their family’s legacy and to figure out how they could be good stewards of that legacy—by engaging next generations of the family to add to it in their own ways. They want to know more about the “big shoes” they are stepping into, and to plan the new path they will walk in those shoes.

By allowing the next generation to place themselves within the family narrative and by extending the autonomy to write their own chapter, you’re giving the spirit of your family’s legacy the best chance to live on.

## PUTTING IT INTO ACTION

- Don't wait. Share family stories—particularly the family history of giving—now and invite the next generation to see themselves as an important part of the narrative.
- Avoid shying away from talking about the family wealth—how it was made, where, the responsibilities associated with it—or the highs and lows of the family story. You can add nuance and layers as you revisit the narrative again and again when your children or grandchildren mature and are ready to hear more.
- Consider using 21/64's [Picture Your Legacy Cards](#) with your family for a fun and easy way to articulate your legacy and invite next gen family members to start to think about the philanthropic legacy they aspire to work toward.
- Let your next generation know if they are expected to steward the family's legacy as is or if they have permission to innovate on a theme. Carve out time in annual board meetings to convey why you support a particular issue or organization and your wishes in terms of sustaining or changing those gifts in the future.
- Bring a videographer to a family holiday or reunion and host a day where you and other seasoned family members tell stories of your involvement with favorite grantee organizations and what that has meant to you. Keep the complete raw footage and request edited videos so family members can watch them more readily. Watch them together with your next gen, discussing and answering their questions.

BEST PRACTICE #6

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# Listen to your next gen’s ideas, especially about strategy and innovation.

As next gen donors build their own philanthropic legacies, they will look to new strategies for affecting change. People in their twenties and thirties are more willing to take risks and suspend disbelief than older adults, making room to imagine a better future, often in bold ways. This new generation is more highly networked than any other in history, which brings a heightened level in terms of exposure; it is constantly presented with new ideas and practices—and they haven’t been conditioned to disregard these as “not how we do things here.” The “impact revolution” we describe in detail in *Generation Impact* is less about *what* they fund and more about *how* they want to approach funding in new ways. In other words, it’s going to be largely a revolution of new strategies and innovations embraced by these rising philanthropists. They want to find different ways to be donors, and uncover new ideas to create impact—including some we can’t even conceive of today.

Of course, this means that most conflicts within giving families will be about strategy, about new ventures, and about risk-taking.

## Take Next Gen Ideas and Input Seriously

While not all of your next gen’s giving ideas will be good—or even make sense for your family—they must be taken seriously. If they aren’t, your next gen will begin to feel they are only there to carry out your wishes, versus peers at the funding table. Loyalty and respect for you will keep them engaged for a little while, even if they feel ignored or underutilized, but won’t ultimately sustain their involvement. According to Aaron Hurst, author of *The Purpose Economy* (Elevate, 2014), Millennials will find ways to pursue their ideas even if it means changing who they work for or devoting their off hours to their purpose-driven projects. In other words, next gen family members will pursue their purpose-driven ideas outside the family philanthropy table if their ideas aren’t given room to be explored.

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**CONFLICTS WITHIN GIVING  
FAMILIES WILL BE ABOUT  
STRATEGY,  
NEW  
VENTURES,  
AND RISK-  
TAKING**

Conversely, next gen donors are willing and eager to bring their ideas to the giving table, especially around strategy and innovation, and can become very engaged. Because they are coming into their roles at a time when there is a great deal of boundary-blurring between the nonprofit and for-profit sectors, they're excited to bring out-of-the-box ideas to philanthropy. One interviewee says,

“You give [the next gen] the option and they come up with these really innovative ideas and they say these really thoughtful things that you wouldn't necessarily hear, because there's a strict way that we do things and they don't quite have that yet.”

While the next gen would do well to respect wisdom and experience, it also behooves elders to keep an open mind and leverage these new ideas where they make sense. As this next gen donor astutely points out,

“Our generation does have superpowers that the previous one might not, and vice versa. There is so much to be learned from one another, and so much to be cultivated and put to such good use, in ways that you would have to be open-minded to see.”

At the family giving table, you can treat the thoughts and input of your next generation as valuable through sincere discussion and by asking and answering questions. This not only shows your next gen are respected as the independent adults they are, but it helps them sharpen their critical thinking and become better funders. You will almost certainly have to guide them through the process, because often they still don't quite know how all the pieces fit together.

Being an active listener will be your greatest challenge. Again, we urge you to approach this as a positive. By widening your family's tolerance for risk, you can use this excitement for innovation as a way to engage the next gen even deeper in family giving. Today, many next gen donors are leading the way in getting their foundations to do impact investing, or to fund PRIs, or to support grassroots organizing. Families might even make creative use of the family history; many family fortunes were built on entrepreneurial risk-taking and innovation. On the flip side, there is risk if you *don't* welcome innovation. Consider this next gen donor who presents the challenges but also a possible path forward:

“There is a trend of, ‘if it's not broken don't fix it.’ ‘This is how we have always done things.’ [Some are] very passionate about a cause or specific points, but are not wanting to rock the boat and not really interested in any change at all. And I think, generationally, that has been very frustrating for me. The battle—and where I have had to become successful—is helping to change that view. I can explain to them in a way that makes sense to them why it should work.”

### Be Willing to Be More Strategic and Analytical with the Family's Philanthropy

To embrace your next gen's yearning for a more strategic philanthropy, you can analyze past funding as a family, learn about a program area together, read proposals as a team, talk to other funders together, interview grantees, and

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**BEING AN  
ACTIVE  
LISTENER  
WILL BE YOUR  
GREATEST  
CHALLENGE**



come to develop a shared strategy—even if it’s just on one part of your funding. Next gen donor Katherine Lorenz, who is featured in *Generation Impact*, said her family holds quarterly learning sessions on specific topics so they can be intentional about getting better informed and grow together. Another next gen donor says,

“What I am trying to do right now is to create new habits within our family of talking with each other about giving, which we have not done in the past. I want us to be more comfortable talking through our personal and collective giving and figuring out together how we want to go forward.”

By embracing some degree of innovation, perhaps with smaller grants at first, you also give your next gen a chance to learn how to give by *doing*. Many next gen donors acknowledge that “failing forward” can teach as much as success. This is part of their willingness to take risks: “It’s only a true failure if you don’t learn from it.” Carve out some safe spaces in your organization that allow your next gen to support new strategies and innovate, where mistakes are manageable and can act as building blocks for your giving to make even more of a difference.

### PUTTING IT INTO ACTION

- Listen to the ideas of your next gen donors with seriousness and respect, and make time in giving discussions for them to offer these ideas.
- Help them to fully articulate their strategy suggestions by asking questions, e.g., “What is your theory of change or rationale for wanting to support this new idea? Can you show me the research you’ve done on this?”
- Set aside dedicated time as a group to review the philanthropic strategy behind your family giving, and identify what’s working and where there is room to innovate. As a starting point, you might want to re-read *Generation Impact*’s Chapter 2, on changing strategies, and, in particular, discuss with your team Figure 3.2 (page 50) on the five most important components of strategic philanthropy.
- Set aside a certain percentage of the funding pool for innovation or a portion of the assets for impact investing if not everyone on the team is ready to go all in.
- Don’t tell your next gen you’ll get back to them on their idea and then never circle back. If you have reservations, point out where your concerns are, e.g., “If this idea goes south, where could this leave us?” “If it succeeds, where could we be?” “Okay, I’m less sure about this for x reasons—how can we still try to do it?”
- Consider ways you can measure the impact of these new strategies and agree on a timeframe for measurement.
- Examine cases once a year where a grant didn’t go as well as it was originally hoped and debrief together what you can learn from the experience. What worked? What didn’t? What might you do differently next time?

BEST PRACTICE #7

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Help your next gen give their *time* and *talent* to a cause or organization. When possible, give yours alongside them.

Next gen donors love to give more than just money to a cause; they want to go all in once they find an issue they're passionate about, giving the resources of their time and talent as well their money. For both inheritors and earners, the next gen see their skills and abilities as a bigger part of their identity than their money. These donors despise being treated "like an ATM and not like a person." Female next gen donors in particular want to be seen as more than fundraisers and party planners. They want to do good and they want to do so with their full selves.

So if the family giving, in partnership with grantee organizations, can be an avenue through which your next gen are afforded the chance to give their *time* and *talent*, this will benefit not just the next gen but the family and their grantees in the long term. And the next gen will see the clear value of that family engagement.

**Experiential, Hands-On Learning Is Best for Developing Next Gen's Talents**

We know the next gen is eager to give early in life, and that they want to develop their philanthropic selves through on-the-ground experiences and volunteerism. So assisting them in finding these sorts of experiences can help them be more engaged, develop their philanthropic identity, and feel more confident as they move into bigger roles in the family philanthropy. As this donor elegantly puts it:

"I think, ultimately, we want to be fully immersed in these experiences. It is through experiential learning that you understand these things. It's those experiences that bolster our knowledge, our education, and our ability to maybe have foresight into issues of the future, like our grandparents did."

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**GIVING  
TIME AND  
TALENT**

**WILL BENEFIT NOT  
JUST THE NEXT GEN  
BUT FAMILIES AND  
GRANTEES.**

Similarly, Victoria Rogers’s story, featured in *Generation Impact* (pages 103–108), is a good example of building identity through early hands-on experiences. She volunteered teaching art as a young person, and then the arts became her main philanthropic passion as she moved into board and other leadership and giving roles. A hands-on approach also forges deep connections and fosters long-term relationships. While next gen donors may start out giving at lower financial levels, their longevity as funders should make up for it. As this donor illustrates,

“The first grant that I did, I met the executive director of the organization that I was working with, and I still know her. I stayed in touch with her for many years. I’m going to get coffee with her next week. And that was ten years ago.”

Don’t forget to invite your next gen to go all in within the family giving vehicle itself. Allow them to play roles in the family foundation beyond just sitting on the board. Given that they desire to be more hands-on, tap into the skills they can bring to bear on the family philanthropy itself. Ask them to write a newsletter, overhaul the website, or serve on the investment committee. Again, by maximizing the skills next gen value in themselves, you can further the foundation’s goals *and* increase the likelihood of their long-term engagement.

### Volunteer as a Family and Talk about What’s Happening in the World

The benefits of giving your next gen opportunities for experiential learning are further enhanced when *you* join them in these experiences. By volunteering together, you get outside the bubble that can often form around a family kitchen or board table. As this young family trustee explains,

“It’s very easy to do this work with your head in the sand. It’s a very insular role, the family foundation trustee. You don’t have to do anything. There’s no accountability. You can go to a board meeting once or twice a year and never get outside that bubble. So, [I’m] making sure that [my children] are out in the world seeing both the problems and also potential solutions.”

Volunteering as a family enables direct learning about what is going on in the fields you’re supporting. The organizers you come in contact with are doing the hard work, day in and day out, and can tell you firsthand about the challenges faced, what is working and what isn’t.

Getting out and engaging with your collective time and talent, and then setting aside family time to discuss what you saw, heard, and learned while volunteering, can improve the effectiveness of the family’s giving. It can also be a way of helping your next gen become more sensitive to the power dynamics of the often difficult donor-grantee relationship. It can provide “teachable moments,” like hearing what nonprofit leaders say they *really* need from donors, and recognizing and discussing how nonprofits might resent having to spend precious staff time and resources to create “meaningful” volunteer opportunities for their biggest donors.

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**BY VOLUNTEERING  
TOGETHER, YOU GET  
OUTSIDE  
THE  
BUBBLE  
THAT CAN OFTEN FORM  
AROUND A FAMILY KITCHEN  
OR BOARD TABLE.**

Finally, volunteering can be a way to build family unity and intergenerational bonding. One next gen donor we interviewed suggests organizing regular family volunteer days throughout the year. “One of the cool things about volunteering together is that it really brings multiple generations together. It feels good to volunteer. It physically feels good. And you can see the impact in front of your face.”

### PUTTING IT INTO ACTION

- Support your next gen in their desire to give both time and talent to a cause.
- Give your next gen family members the [\*Time, Talent, Treasure & Ties\*](#) tool as they discern what kinds of resources and how much of each they have to make available to a nonprofit.
- Emphasize the importance of finding a good fit between their talents and the needs of grantee organizations. Help them navigate when a nonprofit really needs their help or is “crafting” a volunteer experience simply to cater to the donor.
- Volunteer as a family—if you can, at regular intervals. Discuss the issues behind the social problems you encounter.
- Encourage your next gen to bring their skills to the family giving table. Avoid making assumptions about what talents they have or want to give, else you overlook their full potential. Ask them what *they* think they’re good at and want to contribute and look together for opportunities where they can make a difference.
- In addition to offering them a board seat, consider assigning next gen to programmatic or investment committees, pairing them with staff focused on a specific challenge or issue, inviting them to intern to learn how the philanthropy works.
- Some next gen may be interested in helping to organize the “family” in family philanthropy by designing and building a family philanthropy newsletter, planning an annual family retreat, or setting up a quarterly learning session.

## BEST PRACTICE #8

# Help next gen donors leverage their *ties* as well.

Next gen donors have an affinity for engaging peers in their philanthropic journeys. These donors, especially those who are Millennials, are more highly networked than any generation in history and are fundamentally peer-driven. To start with, ties to peer donors are a key resource in and of themselves that the next gen wants to offer to the causes and organizations they care about. But peer connections also provide essential learning, inspiration, and strategic idea mills. Peer connections can provide crucial learning experiences and can help your next gen clarify their philanthropic identity and the role they might play in your family’s philanthropy.

## Invite Your Next Gen to Bring Back What They Learn from Peers

Candidly, next gen donors often don’t know where to go outside their family to receive philanthropic learning. There is no road map for being a funder and there are few formal philanthropic resources aimed at their age group. Next gen donors are seemingly predisposed to seek out and incorporate knowledge from peers, even over other sources, as many of them have grown up in the swirl of the internet. They tend to trust the authentic experience and information they get from peers (horizontal learning) *more* than the stock info they get from organizations, media, or even their advisors (vertical learning).

“You really have to go out on your own and seek knowledge and find your place. Find either peers or an affinity group or some kind of network who will have your back, will support you, and will help you meet the leaders in the field and make that foray.”

Experiences with peer donors are also vital as identity formation activities. Next gen donors told us they appreciate being “able to take my family out of it” at times, because this helps them clarify their philanthropic identity in their own right. Their reliance on peers for strategic advice suggests that they’re crafting their philanthropic identities at the same time as their funding plans. Connecting to peers who are grantmakers gives them another set of checks and balances about *what* and *how* they’re funding—and another set of benchmarks about who they are as funders.

All this suggests you would do well to encourage your next gen to develop skills outside the family through other engagements. Give them peer activities so they learn how they fit in, understand what they can contribute, and know that they are not alone in this work. If they can’t find readily available donor peer groups, help them start their own donor-

advised fund or create a local peer group as a learning community, as some next gen donors in our study did. We recommend you re-read Jenna Weinberg’s feature in *Generation Impact*, “Inspirational Peer Pressure” (pages 156–162), for practical advice on all this.

And don’t forget to proactively encourage your next generation to bring their more well-developed funding abilities back to the family giving table. These skills, with your permission, can enrich the family’s giving. By acknowledging their funding successes outside the family and welcoming their increased excitement, you can engage your next gen even deeper in family giving—and pick up a strategy or two that may enhance your long-term impact.

### Some Specific Opportunities for Peer Engagements

There are many ways next gen family members can connect to, collaborate with, and learn alongside their peers. For starters, you can encourage peer connections among next gen family members—especially cousins who might not otherwise know each other well—by setting up a formal next gen training and giving process, like a junior board, separate fund, or even a next gen retreat. While being mindful of the dangers of keeping the next gen at the “kids’ table” for too long, these next-gen-only processes can be powerful experiences. They work best when they have dedicated advisors, a timeframe, and a clear vision centered around learning, engagement, and leadership. As one next gen donor recalls:

“When our board president wanted to create the junior board, he very much believed that if we trained the next generation in the right way, and started them off very young, then we would create the next generation of board members and the foundation would go on for a very long time, very successfully. And, it wouldn’t have that transition period [between outgoing and incoming generations] that’s very awkward and takes some very intentional strategy to work your way through.”

## FEATURED NEXT GEN DONOR

### ANNE SWAYNE

*Anne is President of the Keith and Judy Swayne Family Foundation. In addition to running her family’s foundation she facilitates peer convenings in Honolulu, Hawai’i where she lives.*

#### *On Finding Mentors and a Community of Peers:*



I don’t want to be in the shadow of my parents. I want to have a say. I want to meet other people who are in the same boat and I want to learn. And I want to meet executive directors who are doing this in a way that I admire and respect, and then I want to meet the ones that are not doing it in the way that I admire and respect. I want to sort of create a community around me that I can learn from. I was not quite sure how to be more impactful and what that meant, but I wanted to find out who was doing that and I wanted to learn from them. I surround myself with people in the philanthropic community that I’ve identified that represent a lot of humility holding an immense amount of power. These people have been incredible mentors to me on what to do, what they’ve seen that hasn’t been good, and mistakes they’ve made. I started to realize how powerful it could be to start to be more open [with other next gen donors]. And you can connect with other people who are in the same shoes as you, who are trustees, who are quietly giving money away. There are a lot of people here who want to come together. We’re still trying to figure out how to conduct ourselves in a way that’s going to be beneficial to the communities that we’re serving.



Giving your next gen a chance to go on site visits or trips together, for instance, has the benefit of building family bonds:

“[Giving] has been an incredible way for us to get to know each other on a totally different level. To have this to connect over, all of us, has been terrific. I’ve learned about who my elder cousins are—philanthropy gave us a new platform to explore what they care about.”

You can also encourage your next gen to take advantage of opportunities to connect with like-minded peers from other families. Family foundation conferences often have next gen “tracks,” or gatherings. For example, your next gen can take philanthropy courses like 21/64’s NextGenDonors Retreat for philanthropists ages 21–40, or their board leadership course designed for next gen with the support of the Paul and Jenna Segal Foundation (PJSF). Finally, next gen donors in our research spoke highly of giving circles both as a way to increase the leverage of their giving (by, say, pooling their funds with others to have more impact) and as a useful learning vehicle. For many, again, it was a way of developing philanthropic skills and identity outside the family.

Overall, by encouraging next gen family members to engage with those facing many of the same decisions at a similar stage in life, you can foster greater enthusiasm, courage, and expertise. Learning and giving with peers will make them better, more confident grantmakers. For instance, this next gen donor talks about the sense of empowerment that came from attending a peer-oriented philanthropy conference, “[It] was incredibly inspiring for me. I realized maybe I wasn’t as alone as I thought, and maybe there are some risks worth taking here that I should consider going for.”

### PUTTING IT INTO ACTION

- Set aside financial resources for your next gen donors to tap, so they can avail themselves of peer networks (e.g., memberships fees), giving circles (e.g., funds to pool), and next gen donor education (e.g., course fees and travel costs), where learning can be seen as practice for what’s to come or, better yet, as transformational for them as well as for society.
- Consider taking advantage of the educational programming, peer networks, and resources that 21/64 has developed geared to new and next gen donors, as well as families and advisors supporting them. Available at [www.2164.net](http://www.2164.net).
- If you are starting a junior board, next gen giving circle, or next gen donor-advised fund, consider identifying a staff member or professional advisor who can offer training and support while allowing your next gen to maintain their autonomy.
- Make a point of asking your next gen who are active in peer donor networks and giving circles what strategies, tactics, or causes and grantees they’ve encountered and find exciting. If something intrigues you, ask the next gen to present it to your family, either formally or informally, for group learning and possible consideration.

## ADDITIONAL RESOURCES, TOOLS & SUPPORT

You are not alone in your effort to engage and guide next gen donors, pass on legacies and align values, incorporate next gen donors into your family giving vehicles, and form healthy, impactful multigenerational teams. Trained professionals, customized facilitation, and hands-on practical resources are available to assist you every step of the way.

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### RELATED RESOURCES

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Sharna’s nonprofit, 21/64 ([www.2164.net](http://www.2164.net)), offers tailored facilitation to multigenerational philanthropic families trying to engage their next gen and align the family’s values, goals, and giving strategies. This can take the form of workshops, family retreats, one-on-one coaching, or longer-term strategic change projects. 21/64 also offers next gen donor retreats, course, coaching and peer networks, in addition to an online store of practical tools, and a nationwide database of certified philanthropic advisors to assist you. The Dorothy A. Johnson Center of Philanthropy ([www.johnsoncenter.org](http://www.johnsoncenter.org)), where Michael is based, offers board trainings, leadership development consulting, and online resources such as LearnPhilanthropy ([www.learnphilanthropy.org](http://www.learnphilanthropy.org)) to help funders meet this next gen challenge. Both Sharna and Michael speak with families and other organizations to expand on their research and address specific needs.

**In addition, we’ve made available to you these resources and tools:**

- Discounts on bulk purchases of *Generation Impact* through 21/64. Please contact [Sara@2164.net](mailto:Sara@2164.net).
- A *Generation Impact Discussion Guide* for small groups and individuals, available as a free PDF download at [www.generationimpactbook.org](http://www.generationimpactbook.org).
- *Engaging Generation Impact: Best Practices for Nonprofits & Fundraisers*, a free 33-page PDF download available at [www.generationimpactbook.org](http://www.generationimpactbook.org). And coming soon, another best practice guide aimed at advisors to families and donors.
- *Time, Talent, Treasure & Ties*, a practical tool for next gen donors that helps them think through how they can make the most impact, including a proactive examination of their “four T’s”; available through the [21/64 store](#).
- Sign up for our e-newsletter on our [21/64 homepage](#) to receive updates on these and other new resources.

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### CONTINUING THE CONVERSATION

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First, we encourage you to review *Generation Impact* on Amazon ([click here](#)) and other online booksellers to let us and others know your thoughts and what you value in the book. Second, we strongly believe that philanthropic families and their staff across the country and beyond—by discussing and debating the findings and ideas in our book through the lens of their experiences—will generate some of the most exciting ideas, solutions, and interesting questions about what’s ahead in next gen donor engagement. We invite you to reach out to us personally at our respective institutions—Sharna Goldseker at 21/64 ([sharna@2164.net](mailto:sharna@2164.net)) and Michael Moody at the Dorothy A. Johnson Center for Philanthropy ([moodym@gvsu.edu](mailto:moodym@gvsu.edu))—to share news of any major initiatives you are spearheading in this area, as well as any problems you run into in applying our work to your families, foundations, and staff development. We welcome the opportunity to learn from you—and we love a good dialogue!