



**CALGARY
FOUNDATION**
FOR COMMUNITY, FOREVER

Your Workbook for Family Philanthropy

**Uniting families across
generations for more effective
and fulfilling philanthropy**

When you become part of the Calgary Foundation, you join a great tradition of community-builders. You hope that your philanthropic choices will mean something not only to your community, but to your family. It is greatly fulfilling to see your descendants following your generous example simply by having watched you, but the Calgary Foundation recognizes that a deliberate approach to engaging next-generation family members is more likely to ensure the continuity of a family's philanthropic goals throughout the decades to come. This workbook serves to help involve, inspire and assist all family members in the planning process.

ARTWORK: *Pintura Pequeña II*, Calgary-based artist Amy Dryer

Time, Knowledge, Treasure

Combined, the gifts of time, knowledge, and treasure, have the power to transform. And when families come together to share their gifts, that power grows exponentially, moving through generations and creating enduring legacies that can meaningfully change the lives of both those who give and those who receive.

Exploring the unique possibilities for giving within each family and learning how to utilize that potential effectively requires focus and experience. This workbook, designed to be used in conjunction with the Calgary Foundation's publication, *Your Guide to Family Philanthropy*, is intended to be a resource for answering the questions that are common to family giving experiences. It is created for families that are interested in taking a strategic approach to philanthropy.

Although we believe that the best and most effective philanthropy begins with an examination of values, passions, and an articulation of goals, the workbook is designed to be used in whatever order works best for your family. You might find that your family is not ready to answer some of the questions posed in the workbook. Don't worry. You can come back to these questions another time.

The workbook is organized into the following three components critical for designing a family giving enterprise:

- 1 Establishing Goals and Getting Started
- 2 Developing Focus, Vision and Mission
- 3 Establishing Operations and Implementation

We encourage you to use the worksheets to explore and understand key decisions and the range of options available to philanthropic families.

There are some worksheets that are intended primarily for the Founder of the Fund your family has established at the Calgary Foundation, particularly if this is a new family endeavor. These exercises (1–5) are intended to help clarify the Founder's goals and interests so that they can clearly communicate what kind of family philanthropy they are inviting other family members to join. Most of the worksheets are meant for your family to work on together in the spirit of learning and sharing more about one another and your common interests.

Finally, a word of both caution and encouragement. While some families easily navigate the waters of creating or refining a family giving experience, others will find that some of this work is neither intuitive nor easily executed. Family conversations about individual or shared values, or how to allocate the responsibilities of operating a family's philanthropy, can be difficult. We hope these worksheets help you to identify and work through some of these challenges more easily.

All content in this workbook was originally written and published by The Philanthropic Initiative (TPI), a nonprofit philanthropic advisory practice and adapted and reprinted by the Calgary Foundation with TPI's permission.

Goals and Getting Started

WORKSHEET 1 • Why Philanthropy?

What are your personal reasons for giving? _____ 4

WORKSHEET 2 • Why Family?

What benefits to the family do you hope to gain as a result of giving together?
What are the goals? _____ 5

WORKSHEET 3 • Who Is Family?

Which family members will be involved? _____ 6

WORKSHEET 4 • Who Is in Charge?

What are your thoughts about decision-making? What is your family's decision-making style? _____ 7

WORKSHEET 5 • Investment?

What will be the giving budget? _____ 8

WORKSHEET 6 • Shared Values

What are your individual and your family's shared values?
How will they influence your family giving? _____ 9

WORKSHEET 7 • Philanthropic Experience

If you have given your time and money in the past, what has that experience been
and what have you learned from it? _____ 12

Focus, Vision and Mission

WORKSHEET 8 • Focus and Interest Areas

What issue areas, populations and types of organizations interest each family member? _____ 13

WORKSHEET 9 • Bringing Values and Interests Together

How can you find connections and common ground? _____ 15

WORKSHEET 10 • Developing a Vision

How can you create a vision for your philanthropy for the future? _____ 16

WORKSHEET 11 • Guiding Principles, Impact and Scope

What are the guiding principles behind what kind of funding you do and how you work together? _ 17

WORKSHEET 12 • Developing a Mission Statement

What will be your purpose or mission statement? _____ 18

Operations and Implementation

WORKSHEET 13 • Finding Organizations to Support

How will you find interesting organizations and funding opportunities? _____ 20

WORKSHEET 14 • Creating Criteria for Choosing

What are the most important qualities for organizations you support? _____ 21

WORKSHEET 15 • Size and Duration of Grants

What will be the size and duration of the grants? Will there be a minimum and maximum size? _ 22

WORKSHEET 16 • Creating a Calendar

How often will you make grant decisions? How often will you meet for other purposes? _____ 23

WORKSHEET 17 • Getting It Done

How will you allocate the work among family members? _____ 24

WORKSHEET 18 • Assessment and Learning

How will you invest in the future of your philanthropy? _____ 25

WORKSHEET 1 • Why Philanthropy?

What are your personal reasons and motivations for being philanthropic?

Which of your motivations do you think you share with other members of your family?

People give for many different reasons. Understanding your own motivations will prepare you to conduct a conversation with family members that looks beyond what organizations you support. You will be able to discuss what moves you, what drives your altruism and why you care about making a difference.

**RATE THE FOLLOWING USING A SCALE OF 1–5,
WITH 1 BEING NOT IMPORTANT AND 5 BEING VERY IMPORTANT**

To share your good fortune by giving back to society

To help those who have less and to meet critical needs in society

Personal identification and experience with an issue, cause, population or organization

Religious and/or ethical beliefs

To improve the quality of life—hospitals, museums, performing groups, theaters, etc.

To set an example for your family

To set an example for peers and others

Social reciprocity—asked by friends and colleagues

To leave a legacy

It is enjoyable and fun

To avoid or reduce taxes

Other

For those to which you give a 5, think about the basis for these motivations and jot down a few notes for yourself.

WORKSHEET 2 • Why Family?

What benefits to the family do you want to gain as a result of giving together?

What are the goals?

There are many different reasons why family members choose to work together in philanthropy. We believe that taking the time to identify the benefits of working together is a crucial first step and makes many of the other decisions about family involvement, decision-making and strategy easier. In all likelihood, your family will have a number of different goals and desired benefits. We encourage you to rank them on this worksheet so that you know which ones are the most important.

In some families, the Founder may wish to complete this worksheet first so that he or she can communicate his or her intent to other family members. Subsequently, all family members may want to complete the worksheet so that they can discuss the responses together.

**RATE THE FOLLOWING USING A SCALE OF 1–5,
WITH 1 BEING NOT IMPORTANT AND 5 BEING VERY IMPORTANT**

Bring the family closer together

Pass on philanthropic values and spirit of giving to the next generation

Encourage the next generation to give of their own resources

Learn more about other family members and their interests

Begin to establish or continue a family philanthropic legacy

Expose family members to the needs of the community

Teach family members how to give effectively

Find a common ground for working together

Have fun together

Recognize and celebrate the family business, history and values

Foster a mindset of abundance

Other

Keeping these goals in mind will help you navigate the bumpy times and maintain a focus on what is most important to you.

WORKSHEET 3 • Who is Family?

1. Which family members will be involved?

There are no firm rules about who should be involved in family philanthropy. If you are the Founder thinking about this issue, you may want to think both about individuals you would like to involve and the broader principles behind your invitation. Are you looking for a certain level of involvement and experience? Or do you want to invite all who consider themselves family to be part of the process?

Answers to this question will also reflect your goals from Worksheet 1.

CHECK ALL THAT APPLY

I will complete the preliminary planning and invite others to join later

Spouse/partner

Children

In-laws

Parents

Siblings

Extended family (if so, how extended?)

Family of the heart (e.g., close friends who are considered family)

Trusted advisor (particularly to the Founder)

Other

2. What do you think will be the criteria for participation in the family's philanthropy?

CHECK ALL THAT APPLY AND DESCRIBE

Age

Location

Demonstrated interest

Experience

Donation of own funds

Ability to attend meetings

Common funding interests

Other

Remember that these decisions are not written in stone. Many families find that the criteria for involvement can change over time.

WORKSHEET 4 • Who is in Charge?**Decision-making Models**

What are your preliminary thoughts about decision-making?

How much will each family member's voice count?

As with Worksheet 1, it might make sense for the Founder to complete this worksheet and then communicate the results to other family members. As a Founder, you may want your family to be part of the philanthropy; however, we encourage you to consider how comfortable you are sharing control. Understanding and communicating this openly to other family members is crucial in developing a successful process. Be aware that other family members may choose not to participate if they believe that their input will not be valued.

There are different levels of decision-making, from who will take notes at meetings to how charities to support will be chosen. The type of decisions you are making will help to determine the manner in which you make them and not all decisions require the same level of consensus or buy-in.

CHECK ALL THAT APPLY

Everyone will be included but realistically the Founder has the only vote

The Founder's vote probably counts more than the others

The Founder will retain veto authority

We would like it to be a democracy but recognize that others will defer to the Founder

Family members will make decisions about their own giving

Decision-making will be delegated to certain family members

A democracy—one person, one vote

Depending on your family style, you can vote openly or cast secret ballots. It is also often helpful to take straw polls to see how people are thinking and feeling in the middle of the process.

We will make decisions through consensus

Consensus means finding a decision that all parties can live with even if there is not complete agreement.

Other

WORKSHEET 5 • Investment

If you are the Founder, you may make many of these decisions before involving the rest of the family. Examine your goals for family philanthropy. If you would like to encourage independent giving, you may want to require that other family members contribute something of their own, in dollars or hours spent volunteering. If you would like to educate the family about issues or philanthropy in general, you may want to consider a budget for conferences, publications and other meetings.

1. If you have a history of family giving, what is the annual charitable giving budget?

2. What will be the annual charitable gifting budget for the family going forward?

This year

Next

Moving forward

3. What giving vehicles will you use?

Volunteering

Direct monetary gifts, either Living or Testamentary

An established Fund at the Calgary Foundation

Private family foundation

4. Do you expect the budget to be allocated in any particular way?

Amount or percentage that the Founder may allocate to organizations of his or her choice

Amount or percentage for each family member to allocate

Amount or percentage for the family to decide upon jointly

Other

5. Will there be additional contributions expected of family members either in dollars or volunteer time? Describe.

Your contribution

Other family members' contribution

WORKSHEET 6 • Shared Values

Since the best philanthropy is guided by values and passions, identifying shared values among family members is an important step in your process. The following questions can help you to identify your core shared values and the relationship of those values to your charitable giving. The simplest way to use them is first as a personal reflection exercise, completed by individual family members. Next, you can come together to discuss and explore areas of commonality. Much of the benefit of this exercise comes from the shared conversation.

INDIVIDUAL REFLECTION QUESTIONS:

1. Think about two or three formative experiences in your life.
How did they shape your core values?
2. Identify two or three people (they could be family members, other people you know or historic figures) who have been strong influences on you.
What values did they transmit to you?
3. What is important to you and what values guide the choices you make in life?
What would you consider your most important values? (If needed, see attached inventory of values.)
4. What values did your parents pass on to you? What do you think are the values common to your family?
5. How do the values you have identified speak to the kind of giver you want to be?

WORKSHEET 6 • Family Discussion Guide

Together with other family members, share and discuss your questions on the preceding page, especially questions 3 and 4. You may want to put all family members' answers up on a piece of easel paper for clear viewing and identify values or clusters of values that seem to be shared by many in the family. Elaborate on them by sharing family stories illustrating the values.

DISCUSS THE FOLLOWING QUESTIONS:

1. What are your core family values? What does the family stand for? Narrow down your list to 4–6 core values.
2. How do these values speak to the kind of philanthropy you want to do? The philanthropy that you want to be known for?
3. Do they have implications for the kinds of organizations and causes that you want to support?
4. Do they have implications for how you want to work together as a family?

Use the answers to these questions to define your family philanthropy vision, mission, goals and approaches to working together. Continually test and refine these values as you observe the philanthropic choices that the family makes.

WORKSHEET 6 • Values Inventory

FROM THE LIST BELOW, SELECT WHAT YOU SEE AS YOUR 6 MOST IMPORTANT VALUES.

Acceptance	Fairness	Preservation
Access	Faith	Pride
Achievement	Family	Privacy
Acknowledgement	Flexibility	Respect
Adventure	Freedom	Responsibility
Agility	Generosity	Security
Arts	Happiness	Self-expression
Beauty	Harmony	Self-reliance
Change	Healing	Service
Collaboration	Honesty	Simplicity
Comfort	Humility	Stability
Commitment	Independence	Stewardship
Communication	Innovation	Tolerance
Community	Integrity	Transformation
Compassion	Interdependence	Truth
Conservation	Involvement	Wisdom
Courage	Joy	Others
Creativity	Justice	
Democracy	Knowledge	
Dignity	Leadership	
Diversity	Love	
Education	Loyalty	
Empathy	Mastery	
Entrepreneurship	Merit	
Equality	Opportunity	
Excellence	Peace	
Expertise	Personal Growth	

Identifying shared values can make you more aware of what you have in common and what keeps your family close. Acknowledging them can give you an understanding of what you want to accomplish together and why.

WORKSHEET 7 • Philanthropic Experience

Sharing each family member's philanthropic experience can reveal common interests.

Again, these questions work best when you try them individually for personal reflection and then come together to share and discuss.

1. As a donor and volunteer, why have you made gifts of money and time?

2. Which of your gifts have given you the most satisfaction? In what way?

3. Which have given the least? Why?

4. What do you feel have been your most important gifts? What made them significant?

5. What skills would you like to offer to the family philanthropic experience?

6. What skills would you like to learn from the experience?

WORKSHEET 8 • Focus and Interest Areas

Many families choose to focus some or all of their giving on selected issue areas, populations or locations in an effort to make more of a difference and gain greater control over the giving process. Others elect to keep their giving options open-ended so they can respond to arising needs and diverse interests within their family. For many families, combining the two approaches encourages the greatest involvement of all family members. Determine which approach will work for you.

1. Interests and Passions:

Are there any issues, causes, places or populations that you care about deeply? Consider the following questions to uncover your philanthropic passions:

- What outrages or angers you about the status quo?
- What inspires you about what is possible for the future?
- Has any event, individual or organization moved or touched you in a significant way?
- Have you had an intense personal or family experience with an issue or cause?
- Do you have a desire to honour a family member or close friend?
- Are you currently involved in an issue or organization in which you can imagine becoming more deeply engaged?

2. Issue Areas:

How interested are you in funding each of the following issues or populations?

PLEASE RATE THEM, WITH 1 BEING NOT INTERESTED TO 5 BEING VERY INTERESTED

Addiction	Employment & training	Literacy
Adult learning	Environment	Mental health
Aging populations	Faith	Peace
Animal welfare	Food security	Persons with disabilities
Arts	LGBTQ rights	Post-secondary learning
Children & families	Health-specific disease	Poverty
Citizen engagement	Health care	Safety
Community development	Heritage	Science & technology
Conservation	Housing	Recreation
Disaster relief	Human rights	Violence prevention
Domestic violence	Immigrant newcomers' inclusion	Women's rights
Early childhood development	Indigenous rights	Youth
Education	International development	Other

WORKSHEET 8 • Focus and Interest Areas

3. Finding a Family Focus:

Determining focus area(s) for the family is usually the result of a process of identifying shared family passions and interests. Some of the ways that you can accommodate very different family interests follow. Which of these might work for your family?

CHECK ALL THAT MIGHT APPLY

- Find the intersection of different interest areas
- Choose multiple focus areas that reflect different family interests
- Plan to shift focus periodically (no less than 3–5 years)
- Allocate separate resources for individual and family giving
- Experiment with one focused project for a portion of the giving
- Other

4. Individual/Family Balance

To what degree would you like the family philanthropy to serve individual interests versus shared family interests? Which of the following options are you considering?

CHECK ONE

- All of the giving will be devoted to shared family interests
- All of the giving will reflect individual interests of family members
- The giving will be a mix of shared family interests and individual interests

What percentage will you devote to individual versus shared interests?

- 10/90 25/75 50/50 Other

5. Geography

CHECK ALL THAT APPLY

All/most of the grants should:

- Go to the community in which the family was raised
- Go to the communities where family members currently reside
- Be focused on
- I am interested in international giving
- Geography is not an important factor

In looking at all of the issues delineated above, keep in mind that there are no right and wrong answers to the questions. In addition, as you work together, you may find that periodically you want to adjust how and where you are giving.

WORKSHEET 9 • Bringing Values and Interests Together

Although the connections may not be obvious, it is possible to find unexpected ways in which your shared values and different interests can lead to common ground. If you have identified values that your family shares, list them below. Next, list the top focus or interests for each of you, trying to keep the total to 4.

Values

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>

Interests or Focus

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WORKSHEET 10 • Developing a Vision

Creating a vision for your philanthropy is an opportunity to imagine and dream about the potential results of your giving. Many people find that drafting a vision statement first allows them to more easily create a mission statement later.

A vision statement is an image of the mission accomplished, a picture of the ideal future state.

TO HELP YOU DEVELOP A VISION STATEMENT, TRY THE FOLLOWING EXERCISE

Imagine a newspaper story 20 years from now, announcing an event to honour your family philanthropy for 20 years of high-impact charitable giving and for having changed the world in some significant way. How would the headline read? Fill in some of the details under the headline that provides some specifics.

WORKSHEET 11 • Guiding Principles, Impact and Scope

You might also find it useful to establish a set of “guiding principles” for your giving. These may be descriptors of how the family wants to work together and/or work with charities, and are often a reflection of your shared values. Guiding principles may also help you identify the kinds of organizations and programs you wish to support.

Which guiding principles would you choose for your family’s giving?

Ambitious	Innovative	Risk tolerant
Bridging	Leveraged	Supporting success
Challenging	Nimble	Targeted for impact
Collaborative	Partnering	Visible
Entrepreneurial	Proactive	Other
Flexible	Proven	
Hands-on	Quiet, behind the scenes	
Inclusive	Responsive	

In thinking about where you would like to have impact with your giving, consider whether you will give locally, nationally or internationally. If your family is geographically dispersed, you might give to similar organizations in different locations. On the other hand, making gifts internationally can potentially allow your dollars to go much further. Please note, the Calgary Foundation can support endeavours beyond our borders, but only through registered Canadian charities that work internationally.

If you have an issue of particular interest, do you think about affecting individual lives, supporting organizations, giving to an issue area in general or perhaps affecting systems and policy on a local or national level? There are no right or wrong answers.

LEVEL OF IMPACT AND GEOGRAPHIC SCOPE

Which of the following impact levels interest you the most?



WORKSHEET 12 • Developing a Mission Statement

Your family may find it useful to develop a mission statement for your giving. The mission statement articulates the values and purpose of the family's philanthropy to the outside world, charities or other donors, and to family members themselves.

Many families however want to experiment with their giving before they develop a formal mission statement. You can review the mission statement on a regular basis to see whether it continues to reflect the family's goals. Examples of mission statements follow. The most useful mission statements address the following questions:

- What is the philanthropy's purpose?
- How will it achieve its purpose?
- What are its core values?

1. What are some of the words and phrases that you think should be captured in your family philanthropy's mission statement?

Look to your values (worksheet 6) and guiding principles (worksheet 11) for some ideas.

2. Create a draft mission statement here.

You may have one family member who writes a first draft for others to review or a committee of family members who draft one or more alternatives.

WORKSHEET 12 • Sample Family Philanthropy Mission Statements

"Our family seeks to bring opportunity to the disadvantaged, strengthen the bond of families and improve the quality of people's lives."

"We are very concerned about the impact of urban sprawl and other environmental consequences of population growth. Through our family philanthropy, we will seek to find new solutions to these problems and enable grassroots groups to exert their voice and influence."

"Through our family philanthropy, we would like to support strong institutions that contribute to the civic and cultural fabric of our community."

"Our family's goal is to support and inspire creativity in the communities in which we live."

"We will seek opportunities to fund responsible organizations that help people to build their communities from the inside out. We look to support those projects that mobilize local resources, work collaboratively and produce measurable results."

"Our family seeks to reduce youth and female poverty by helping disadvantaged adolescent and preadolescent girls take charge of their own lives."

WORKSHEET 13 • Finding Organizations to Support

How will the family identify granting opportunities?

CHECK ALL THAT APPLY

There are many different ways to identify promising funding opportunities and organizations that meet your shared goals and criteria. Your family may choose several of these approaches or may find that one approach makes more sense at a given point in time. It is important to openly communicate your process to potential funding seekers, even if that means advising them that you will not accept unsolicited proposals.

Family members will each identify charities and projects, and bring their ideas or research to the family for consideration.

Community issues and needs may be explored through tools offered by the Calgary Foundation, such as:

- Annual Report – a comprehensive annual publication listing all of our Funds and grants as well as an insightful overview of our performance for the year in our Management Discussion & Analysis
- Community Knowledge Centre (CKC) ckc.calgaryfoundation.org, an online tool on the Calgary Foundation's website that connects you to the innovative work of charitable organizations that serve our community
- Vital Signs Report – citizen grading and issue area research of various aspects of life in Calgary
- Community Grants – past community initiatives supported by the Calgary Foundation are listed on our website and a list of current grant applicants may be provided by request
- SPUR Magazine – inspiring stories of philanthropists and community projects
- Impact Reports – issue area publications highlighting the work of charities in the area of concern
- Ask our Donor Stewardship staff for ideas

Additional resources may include:

- Trusted friends and family members
- Direct conversations with charities – these are always the best way to learn about whether the culture and objectives of an organization are a fit for the family's philanthropy
- Individual charity websites – accessible through internet searches

Searchable databases:

- Canada Revenue Charities Listing Website – provides a searchable listing of all registered charities in Canada: cra-arc.gc.ca
- Canada Helps – online donating platform: canadahelps.org
- Charity Intelligence – a number of Canadian charities are rated based on transparency, accountability, need and efficiency; focus strongly on financial performance vs. social impact: charityintelligence.ca

Other

WORKSHEET 14 • Creating Criteria for Choosing

Once you have found organizations that interest you, choosing among them can be even more challenging. One of the overarching goals of a good decision-making process is to try to judge consistently so that those decisions don't feel arbitrary. Creating criteria for making decisions can also help you focus on what you think are the most important qualities of an organization and proposal.

SHARE WHAT THE FOLLOWING CRITERIA MEAN TO YOU. RANK THEM IN ORDER OF IMPORTANCE FROM 1–8, WITH 1 BEING OF GREATEST IMPORTANCE.

Possible Criteria

Potential Impact

Urgency of Need

Appropriateness and Strength of the Proposed Approach

Quality of Leadership and Management

Track Record and Stability

Degree of Risk

Gut Feeling

Other

WORKSHEET 15 • Size and Duration of Grants*

Some people like to recommend fewer grants to amplify the size and impact of each grant* on a select number of organizations. Others prefer to spread their support across many areas of the community. There is no right or wrong approach. As you approach deciding on the amount you would like to grant, you may consider the questions below.

*Donations made from the Calgary Foundation and its Funds are referred to as grants. For the purpose of these worksheets, all donations made from the family will be referred to as grants and recipient organizations will be referred to as grantees.

1. Does the family have any thoughts with regard to the minimum, maximum or average size of the grants?

CHECK ALL THAT APPLY

Yes, the minimum grant will be \$ _____, the maximum will be \$ _____ and the average will be \$ _____

Different family members will have different parameters (e.g., Founder versus other family members)

No expectations at this time

Other _____

2. Does the family have any thoughts about the duration of the grants?

CHECK ALL THAT APPLY

Again, there are no rules about grant duration. However, multi-phased grants can benefit both the family and the charity. The family will have the opportunity to build relationships with the charity while providing more stability to the organization. Remember however that the amounts available to grant from endowment funds may vary greatly over time depending on market performance, so be very conservative in making future commitments that rely on these.

One-year long grants only

One-year long grants that are renewable based on performance

Multi-phased grants

No expectations either way

Other _____

WORKSHEET 16 • Creating a Calendar

As you create a calendar for the family's philanthropy, you may want to consider combining meeting times with family reunions, holidays or other gathering times. Family meetings could include time to share family stories, review learnings and reference materials or visit charities that the family has supported or might wish to support.

1. How frequently will the family make grant decisions?

Once a year we will have a family meeting

When?

Twice a year

When?

More than twice a year

How often?

We will set up a process so we can make grant recommendations anytime

Other

2. Will the family meet at other times for such purposes as learning about community issues, discussing the results of past grants or planning the future of the family philanthropy?

CHECK ALL THAT APPLY

In person meetings

Conference call meetings

Combined with other family activities (e.g., vacations, holidays)

Other

WORKSHEET 17 • Getting it Done

How will the tasks of organizing and running the family's philanthropy be accomplished? Who will take responsibility within the family? For which tasks will you look for help outside of the family?

PLEASE FILL IN THE FOLLOWING TABLE

TASK	PERSON OR COMMITTEE RESPONSIBLE
Learning more about the needs of the community or issue area	
Identifying funding ideas and organizations	
Due diligence on organizations you are considering funding (site visits, charity research review, review of financials)	
Preparing materials for family meetings	
Running the family meetings	
Keeping notes of family meetings	
Communicating within/to the family about the grantmaking and grantees	
Monitoring the grants that have been made	
File management	
Receiving communications about the activities of the Fund	
Recommending grants to the Calgary Foundation or activating gifts outside of the Foundation	
Ensuring that family members grow and learn as philanthropists	

WORKSHEET 18 • Assessment and Learning

**1. How will the family learn from, evaluate and monitor the impact of its grantmaking?
What approaches are you interested in?**

CHECK ALL THAT APPLY

Grant acknowledgement letters sent from grantees

Grantees' annual reports and websites

Progress reports from the grantees (typically for grants of \$5000 or more)

Visits to the grantees to see the results of the giving

Presentations made by the grantees at family meetings

We know these organizations and will keep in touch

Other

2. Learning

Investing in your family's learning is an important component of giving well. In addition to learning from your grantees, there are many resources for learning about philanthropy in general as well as for learning about your particular areas of interest. Consider what kinds of experiences you would like to have and how much you wish to budget for family learning.

Review family philanthropy resources available on the Calgary Foundation website

Attend workshops and conferences on general philanthropic topics

Source and/or purchase reference materials

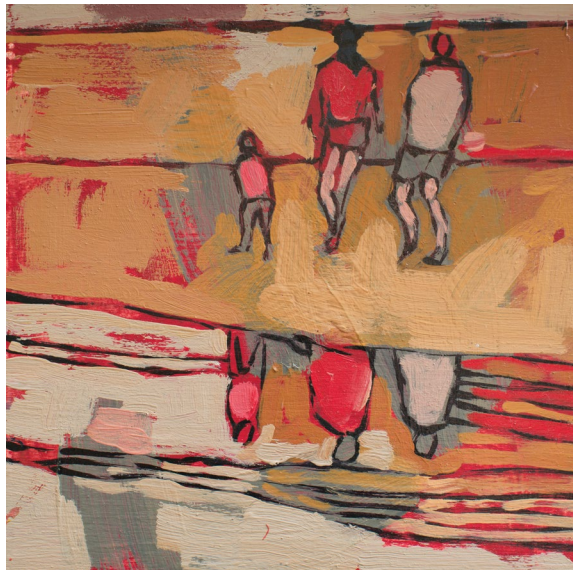
Final Words

Remember, although we hope that your family philanthropy will be for a lifetime, the decisions you make now will shape whether or not to begin the process. You can and should revisit these questions and worksheets whenever you feel that your process needs adjustment. You might also want to take a look at these on a regular basis. As your family grows, adds new members and becomes more experienced in giving together, many of your ideas and answers from today will need revision. Your shared values are likely to remain the same, but everything else will evolve as you do.

We wish you well as you work together in shaping your family's unique legacy of philanthropy. Please let us know if we can be of assistance along the way.

One last thing: we would love to hear from you to know how this publication has been useful. If you have comments, questions or suggestions, please be in touch with Lailly Pirbhai, Vice-President, Donor Engagement at lpirbhai@calgaryfoundation.org

The Philanthropic Initiative (TPI) is a nonprofit philanthropic advisory practice that helps companies, foundations, families, and individuals find innovative ways to increase the impact of their giving. Working around the globe, we partner with clients to create, implement, and evaluate customized philanthropic strategies. Through thoughtful planning in family philanthropy, TPI brings family members closer to one another—and to their vision of the world they want. Since 1989, we have directed more than one billion philanthropic dollars and influenced billions more on behalf of our clients. Today, we continue to work with passionate families, foundations, and corporations of all experience levels who believe they can and should increase the impact of their giving. Learn more at www.tpi.org.



30% Post Consumer Waste