

Your Workbook for Family Philanthropy

Uniting families across
generations for more effective
and fulfilling philanthropy.



Time, Knowledge, Treasure

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 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.

When 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.

This workbook is intended to be a resource for answering the questions that are common to family giving experiences.

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:

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.

Some worksheets are intended primarily for the Founder of the Fund your family has established at 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 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.

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Goals and Getting Started

WORKSHEET 1 • Why Philanthropy?	4
WORKSHEET 2 • Why Family?	5
WORKSHEET 3 • Who is Family?	6
WORKSHEET 4 • Who is in Charge?	7
WORKSHEET 5 • Investment	8
WORKSHEET 6 • Shared Values	9
WORKSHEET 7 • Philanthropic Experience	12

Focus, Vision, and Mission

WORKSHEET 8 • Focus and Interest Areas	13
WORKSHEET 9 • Bringing Values and Interests Together	15
WORKSHEET 10 • Developing a Vision	16
WORKSHEET 11 • Guiding Principles, Impact, and Scope	17
WORKSHEET 12 • Developing a Mission Statement	18

Operations and Implementation

WORKSHEET 13 • Finding Organizations to Support	20
WORKSHEET 14 • Creating Criteria for Choosing	21
WORKSHEET 15 • Size and Duration of Grants	22
WORKSHEET 16 • Creating a Calendar	23
WORKSHEET 17 • Getting it Done	24
WORKSHEET 18 • Assessment and Learning	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, theatres, 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 | ☐ Extended family (if so, how extended?) |
| ☐ Spouse/partner | ☐ Family of the heart (e.g., close friends who are considered family) |
| ☐ Children | ☐ Trusted advisor (particularly to the Founder) |
| ☐ In-laws | ☐ Other _____ |
| ☐ Parents | _____ |
| ☐ Siblings | |

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

- ☐ 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 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' contributions

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 inventory of values on p. 11.)**

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

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	_____ 2SLGBTQIA+ 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's 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 MIGHT 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:

- > _____
- > _____
- > _____
- > _____
- > _____
- > _____
- > _____

Interests of Focus:

- > _____
- > _____
- > _____
- > _____
- > _____
- > _____
- > _____

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

Imagine a newspaper story 20 years from now, announcing an event to honour your family's 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.

[illegible]

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, Calgary Foundation can support endeavors 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 Calgary Foundation, such as:

- Annual Report – a comprehensive annual publication listing all of our Funds and grants.
- Community Knowledge Centre (CKC) ckc.calgaryfoundation.org, an online tool on 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
- IMPACT Donor E-News – timely information about community issues and initiatives
- Community Grants – past community initiatives supported by 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
- Ask our Donor Stewardship staff for ideas

Additional resources may include:

- Trusted friends and family members
- Direct conversations with charities
- 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.

_____ 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 decide on the amount you would like to grant, you may consider the questions below.

*Donations made from 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 of financials)	
Preparing materials for family meetings	
Communicating within/to the family about the grant making and grantees	
Monitoring the grants that have been made	
File management	
Receiving communications about the activities of the Fund	
Recommending grants to 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 grant making?
What approaches are you interested in?****CHECK ALL THAT APPLY:**

- _____ Grant acknowledgment letters sent from grantees
- _____ Grantees' annual reports and websites
- _____ Progress reports from the grantees (typically for grants of \$5,000 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 Calgary Foundation website
- _____ Attend workshops and conferences on general philanthropic topics
- _____ Source and/or purchase reference materials

[illegible]