



**CALGARY
FOUNDATION**
FOR COMMUNITY, FOREVER

Your Guide to Family Philanthropy

You have dedicated an important part of yourself to helping others perhaps through donations, volunteering, or kind words. You hope that what you have done has mattered; and you hope it always will.

You hope it will mean something not only to your community, but to your family. It would be 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.

Bring your family together to identify and shape your legacy. We hope that this guide inspires and assists you in your planning process.

Many families choose the Calgary Foundation either as an alternative or a complement to setting up a private foundation because of our connections to the community and simply because it's administratively easier. Families can then focus on the most fulfilling part of philanthropy...Giving.

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Know your Purpose:

Your purpose in establishing a multi-generational family giving strategy may be:

- To ensure continuity for your strategic giving past your lifetime, i.e. to benefit the community in a specific way and you want the next generation to continue with this focus
- To teach your values to the next generation
- To involve your children and grandchildren in your philanthropy
- To enable your children and grandchildren to develop their giving values and discover philanthropy
- To leave a legacy
- To create a common bond that keeps the family together

My/our purpose is:

Shared Values:

Identifying shared values among family members is an important step in establishing your core shared values and the relationship of those values to your charitable giving. You may consider completing the questions below independently and then sharing your responses widely with a group.

Share two or three formative experiences in your life. **How did they shape your core values?**

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?**

What values did your parents pass on to you?

What do you think are the values common to your family?

Inspiration:

The questions below can help to generate discussion about the impact you would like your philanthropy to make in the community.

What strengths do you see in your community that you think should receive further support?

What challenges in your community do you think need attention?

What impact do you hope your family can make through charitable giving and/or volunteering?

Focus:

Do you wish to have a particular focus for your giving? You may wish to have a broad focus.

Examples are:

- basic necessities
- environment
- thriving populations
- lifelong learning
- arts
- community connections
- wellness
- building capacity

You may wish to have a more specific focus. Examples are:

- poverty
- aging population
- Aboriginal peoples
- mental health
- neighbourhoods
- post-secondary learning

You may wish to have an even more specific focus. Examples are:

- To support the conservation of Alberta's watersheds
- To support scholarships for masters or doctoral students pursuing veterinary studies
- To support low income Calgarians with a hand-up

Whether or not you have a focus depends on your philosophy towards giving and what you wish to achieve. Some families wish to spread their giving as widely as possible to touch as many needs as possible. Other families like to give to all causes that ask and never want to say "no." Others want to make a bigger impact in a smaller arena of needs. And some feel they can have the most impact by putting all of their support behind one cause, a cause they feel most deeply about.

Sometimes a family selects an area of focus in advance of any granting. And sometimes, after years of granting, a family notices a pattern in its giving and discovers in retrospect that it has a focus, which it then formalizes. The focus can change. Moreover, it can help the family take action when choices can be overwhelming.

My/our Focus would be:

Discovering Causes to Support:

By what means would you like to bring project ideas to the table for the consideration of the family?

Options you might consider:

- Each member can bring projects that they would like the family to consider. This often requires research by the family member and the making of a presentation to the family to *sell* their cause. This can really engage members in getting to know their community.
- You can explore community needs through tools offered by the Calgary Foundation, such as:
 - Community Knowledge Centre (CKC), an online tool on the Calgary Foundation website that connects you to the innovative work of charitable organizations who serve our communities;
 - Vital Signs Report
 - Community Grants – past initiatives listed on our website or current applicants list provided by request
 - SPUR Magazine
 - Ask one of our Donor Stewardship staff members for ideas

The causes I/we would like to consider are:

Recognition:

Some families prefer to remain anonymous.

- To avoid being singled out
- To avoid being hit up for more giving
- To avoid standing out as different from their peers

Others prefer to let their names be attached to their giving.

- To demonstrate leadership
- To show you care
- To inspire others, set an example, lead the way

Each preference has legitimate and noble reasons. Neither is right or wrong. And you may change how you think about this over time.

Children often have different recognition needs and considerations than adults.

As you make your granting decisions, you might consider the kind of profile you want to have with the charities that you support.

Our family's thoughts on public recognition versus anonymity:

Decision-making:

Participation in decision-making as a family fosters engagement. Clarifying the decision-making process and leadership roles in advance helps to ensure that your giving is enjoyable and effective.

Things to consider:

- Will the chair of the family group change or rotate over time?
- Are all votes equal?
- Does anyone have veto power?

Options to consider for decision-making:

- By majority vote
- By consensus (all must agree)
- By division of the pot and each is responsible to choose a project for their portion
- Or by a combination of the above

You can change your decision-making model over time as all members of the family gain more experience in giving.

The decision-making model that I/we would like is:

Communication:

Effective communication is a key factor in fostering family engagement opportunities and building your philanthropic legacy.

Things to consider:

- How often does the family wish to meet to discuss giving motivations and granting decisions? You may opt for an informal meeting at the annual family dinner, or a more structured meeting approach.
- How will you keep records of family discussions and decisions?
- How will you share your philanthropic values, inspiration and activities with younger members of your family?
- Who will be the main contact with the Calgary Foundation, lead discussion on behalf of the family, and make grant recommendations?

Your thoughts on meeting format and frequency:

Your thoughts on the timing of grant decisions:

Your thoughts on record-keeping and sharing information?

Your main contact with the Calgary Foundation:

We hope that you found this guide helpful. **Individual worksheets are available to deepen and complement your strategic giving plan and process.** We wish you well as you and your family create a meaningful legacy!

For more information please contact:

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