

Top 10 Ways to Position Your Community Foundation to Serve Philanthropic Families



NATIONAL CENTER FOR
FAMILY PHILANTHROPY

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@familygiving
#NCFPCF



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POLL

Do you offer family philanthropy services as part of your donor services?

1. Not yet.
2. Yes, but we are working to add more.
3. Yes, we offer a variety of services.

POLL

How would you describe your staff's value-add to families?

1. Effective fundraiser and/or gift planner
2. Pro at high-quality customer service, educator
3. Grantmaking & philanthropy strategist
4. Coach, facilitator, sense-maker

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The Case for Family Philanthropy Services

Successor generations influence your CF's destiny

- ✓ What % of your assets are DAFs?
- ✓ What % of DAFs have successors named or want kids/grands involved?
- ✓ How prepared are successors to be effective, engaged donors and community leaders?

Starting when they're adults is way too late

Your Opportunity

Generous families want help with:

- ✓ Defining and passing on values and traditions
- ✓ Preparing heirs for responsible use of resources
- ✓ Defining parameters for meaningful, effective giving, volunteering, social investing

Their professional advisors aren't helping much, yet...

Your Opportunity

Private foundations want help with:

- ✓ Succession planning
- ✓ Managing family & board dynamics
- ✓ Preparing rising generations for leadership
- ✓ Geographic dispersion and anonymity

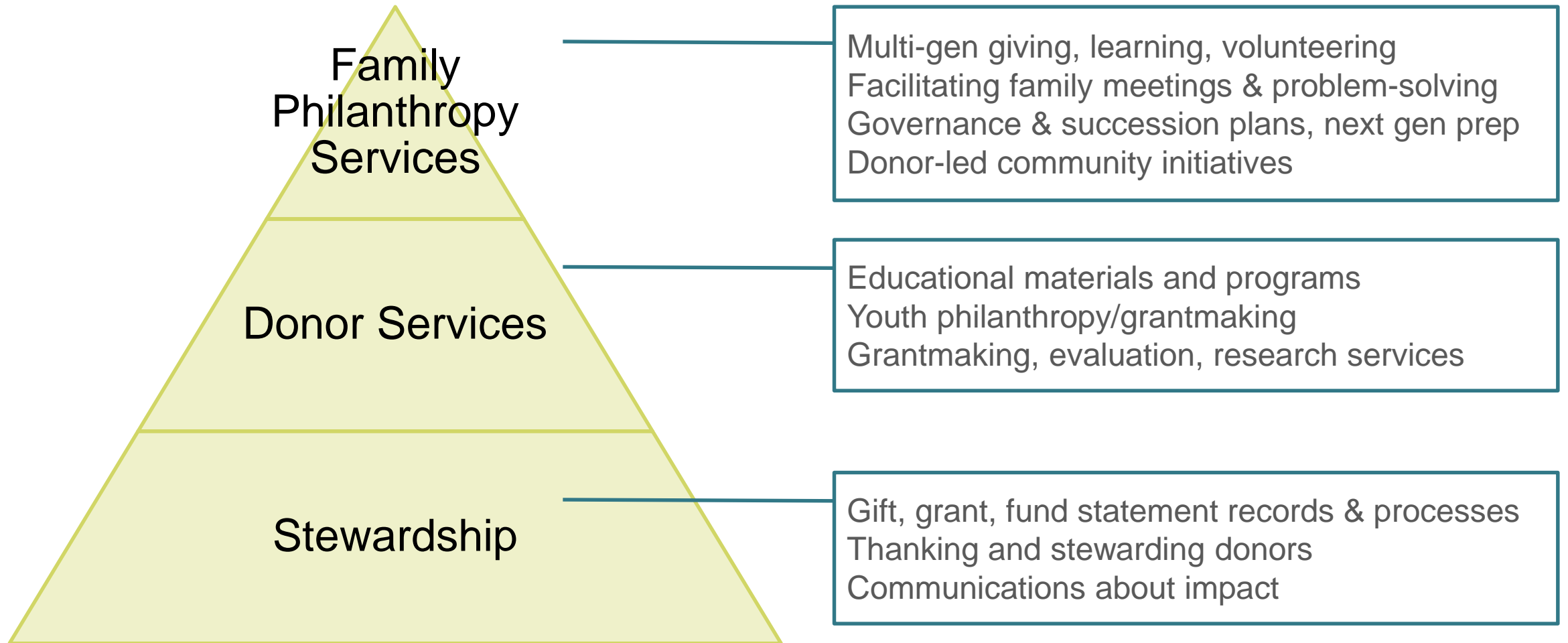
Families aren't often equipped for this



1.

Ensure you have your core **donor stewardship** activities humming along smoothly and that you've successfully tested some **donor services**.

Philanthropic services



2.

Be clear about your **primary goals** for adding family philanthropy services.

- ✓ Internal case statement and hypotheses
- ✓ Upfront investment in capacity for longer-term ROI

3.

Alignment around **metrics** for progress and success.

Foundation
benefits

Donor family
benefits

Community
benefits

4.

Create a clear **pricing structure** and **business model** – based on market demand and defined market segments.

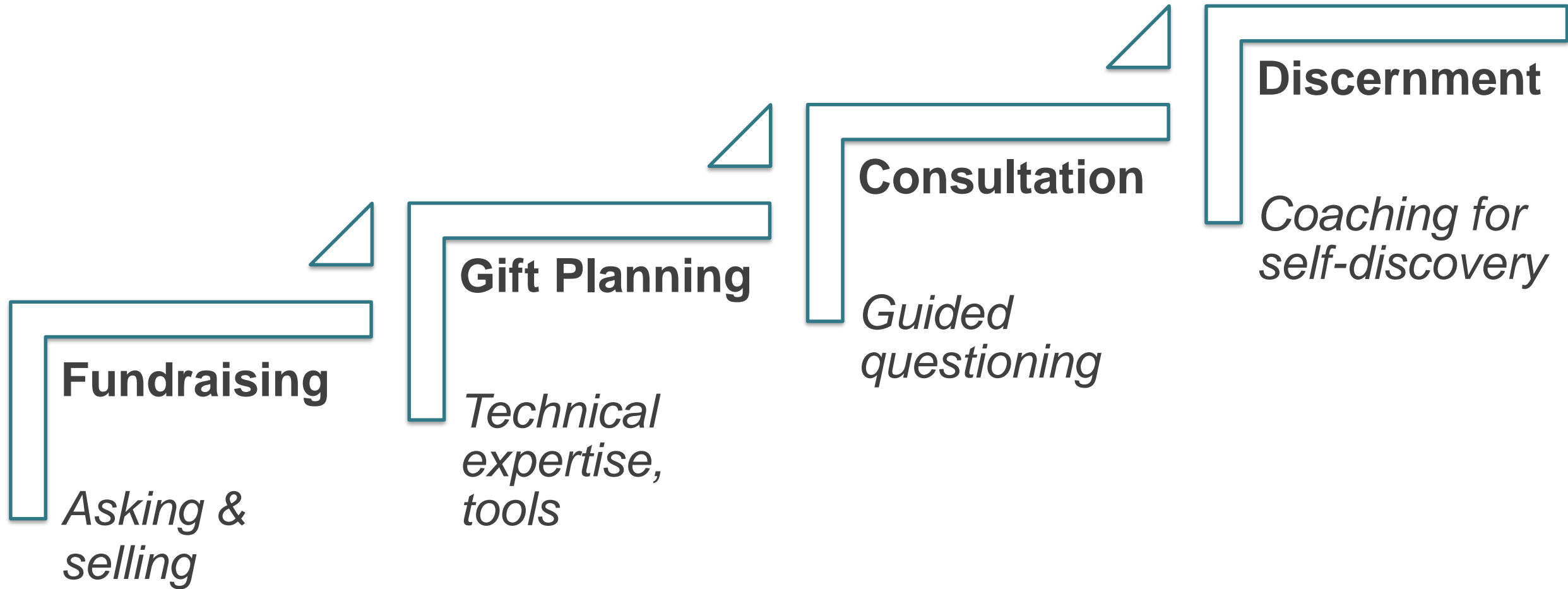
Fund fees
cover
expenses

Pricing per
product or
service

Subscription
or minimum
annual fee

5. Develop an **internal culture** of **discernment** and **advising**.

4 Styles



QUIZ

What is your current donor intake & onboarding process?

- a) No formal orientation, just info on website
- b) Meet to discuss how foundation works, how donor can add to fund; provide a list of grantees
- c) Orientation captures info on family giving history & goals; develops plans for next gen services

6. Create an **intake** and **on-boarding** process that involves the broader family.

7. Develop quick access to **trusted partners** with related expertise.

- ✓ Program consultants
- ✓ Mediation and conflict resolution
- ✓ Business valuation and transfer
- ✓ Family therapy, addictions treatment
- ✓ Independent trustees

8.

Start with a few **early wins**, adapted from peers, that you can confidently deliver.

- ✓ Outside speakers
- ✓ Customized grantmaking and evaluation
- ✓ Family site visits
- ✓ Philanthropy plans

9.

Develop deeper staff **skills** and **knowledge**.

- ✓ Generational styles, communications
- ✓ Family systems theory
- ✓ Facilitation and coaching
- ✓ 21/64 or Chartered Advisor in Philanthropy

10. *If there's demand later, develop ability to help families tackle deeper challenges:*

- ✓ Family meeting facilitation
- ✓ Governance and decision-making
- ✓ Succession and power dynamics
- ✓ Scenario planning, achieving durable consensus

Dialogue

NCFP Community Foundations Family Philanthropy Network

Family Philanthropy Readiness Self-Assessment

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Assess mission fit, market opportunity, capacity, perceived business model, success measures

<https://www.ncfp.org/resource/cfi-self-assessment/>

Free!

Your weighted scores

Overall weighted score (average of 5 metrics)



Metric 1: Mission and core business compatibility



Metric 2: Understanding your market



Metric 3: Donor stewardship and philanthropic services capacity



Plan, develop, and implement family philanthropy services

**Part free,
part paid**

1. Planning ahead, building the case
2. Defining market and position in it
3. Value proposition
4. Channels and partners
5. Key resources needed
6. Cost structure
7. Impact measures

Your Next Steps?

Thank you!

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