



Foundations in Practice: A Resource List

The following resources are available online to NCFP Friends and community members of our Family Philanthropy Online Knowledge Center partners. Please log in to the Knowledge Center at www.ncfp.org.

Grantmaking, Geography and Leadership

1. **Igniting the Spark - Creating Effective Next Gen Boards (2013)**. This *Passages Issue Brief* introduces an increasingly popular method for preparing the next generation for philanthropic service: the next generation or junior board. The paper covers the variety of purposes for establishing next generation boards and describes options for preparing younger family members for governance and grantmaking.
2. **Over the River and Through the Woods: Geographic Dispersion in Family Philanthropy (2013)**. This webinar looks at strategies that families who are located far apart can take to build family identity and bonds that once evolved naturally from living in close proximity.
3. **Discretionary Grants: Engaging Family... or Pandora's Box? (2012)**. This *Passages Issue Brief* examines changing family foundation practices and trends around discretionary grants.
4. **Family Philanthropy Beyond Borders: Best Practices for Family Foundations with Geographically Dispersed Board Members (2011)**. This study investigates how family foundations manage governance, decision making, and, especially, daily work activities when the number of local board members diminishes.
5. **Grantmaking With a Compass: The Challenges of Geography (1999)**. Using stories of families, this monograph offers example of how families have dealt with these issues including: honoring the legacy of the donor; defining a mission that accommodates individual interests and needs of different communities; maintaining high standards of grantmaking practices and evaluation strategies; and allocating funds equitably.
6. **Discretionary Grants: Encouraging Participation... or Dividing Families? (2001)** This *Passages Issue Brief* looks at the common reasons that families use or opt not to use discretionary grants, and the typical process that is used to make these types of grants.
7. **Strategic Philanthropy: Maximizing Family Engagement and Social Impact (2008)**. This *Passages Issue Brief* discusses how family foundations can transition from a giving approach based on trustees' disparate interests, to a more focused and strategic approach based on common values and interests.

Finding Agreement on Family Boards

1. **A Place at the Table: Non-Family Membership on the Family Foundation Board (2011)**. This *Passages Issue Brief* discusses the advantages, challenges, questions, and opportunities of engaging non-family trustees on a family foundation board.
2. **Families In Flux: Guidelines for Participation in Your Family's Philanthropy (2004)**. This *Passages Issue Brief* addresses changing family composition and circumstances and how philanthropic families may deal with them.

3. **Demystifying Decisionmaking in Family Philanthropy (2003)**. This *Passages Issue Brief* describes different kinds of decisions made under varying conditions and circumstances require different decision-making methods.
4. **Managing Conflicts and Family Dynamics in your Family's Philanthropy (2002)**. This *Passages Issue Brief* defines conflict in family philanthropy and describes how conflicts typically surface in families that give; offers advice and guidance from experts on how to manage these conflicts.

Choosing and Preparing Your Grantmaking Successors

1. **Choosing and Preparing Your Grantmaking Successors (2010)**. This *Passages Issue Brief* by GMA Foundations President Mary Phillips profiles the succession planning experience of the Howard and Geraldine Polinger Family Foundation and the challenges faced when the foundation sought to add third generation family members to its Board of Directors.
2. **A Legacy Lives On: The Kaplan Family Foundation's Successful Leadership Transition (2013)**. This *Passages Issue Brief* shares the Kaplan family's experience with transition—the factors that contributed to their success and those that challenged them—in hopes of helping other families who will inevitably face leadership transitions of their own.
3. **Successful Succession: Inspiring and Preparing New Generations of Charitable Leaders (2003)**. This *Passages Issue Brief* by NCFP Founder and President Virginia Esposito describe why, when, and how your family foundation's board can prepare the next generation for charitable service.
4. **Passing the Baton? Generations Sharing Leadership (2008)**. This *Passages Issue Brief* by NCFP Senior Fellow Alice Buhl discusses lessons learned from family business, options for shared leadership including senior councils and next generation boards, and offers tips for senior and next generation leaders.
5. **Opportunity of a Lifetime: Young Adults in Family Philanthropy (2002)**. This *Passages Issue Brief* addresses one of the most important opportunities in family philanthropy - encouraging young adults to take part in the family's giving process and to become philanthropic in their own right. What are the reasons that families involve young adults? And what can young adults themselves do to become more connected to the family's philanthropy?

For additional information and resources, please contact the National Center for Family Philanthropy at 202.293.3424 or www.ncfp.org or GMA Foundations at 617-426-7080 or www.gmafoundations.com.