

CLIENT ADVISORY

Approaches to Involving the Next Generation in Philanthropy and in the Family Foundation

Children can be introduced to philanthropy at any age, learning by example or encouraged to give part of their allowance or their time to a cause they care about. These ideas for family boards wishing to involve the next generation are divided by age groups 13-17, 18-21 and 22+.

Involvement for Ages 13-17(+)

Attendance at meetings

Open board meetings to next generation members interested in attending.

Board Committees

Invite next generation members to serve on one or more committees, such as site visit committee, education committee.

Discretionary grantmaking

Provide a modest stipend for young family members to award to the charity or charities of their choice. Give the Gift of Giving – fund a charity checkbook for youth to draw on during the year.

Family Newsletter

Establish a family foundation newsletter or e-newsletter to inform all family members about the foundation's activities and identify opportunities for next generation involvement – upcoming site visits, trustee meetings, etc.

Individual presentations

Invite young family members to present an organization for funding to the foundation board.

Junior board

Develop a junior grantmaking board composed of all family members in this age range. Assist the junior board to develop their grantmaking areas of interest. Allocate a sum of money for the junior board to award.

Site visits

Welcome next generation to appropriate pre and/or post grant site visits to observe and begin to learn about the work of the foundation, talk about what you see and how the foundation might help.

Training retreat

Plan an informal training program geared to the age level of those interested in attending.

Volunteerism

Encourage next generation members to engage in a meaningful volunteer experience and reward their volunteerism by making a grant to organizations in which youth complete a volunteer commitment.

Involvement for Ages 18-21(+)

Adjunct board

Develop an adjunct board to serve an advisory role to trustees and continue as a training ground.

Board committees

Expand the range of board committees open to younger family members, such as the grant committee, investment committee, planning committee.

Discretionary Grantmaking

Offer discretionary grants for next generation members; require a written and/or oral presentation to the board. Provide matching grants when one or more next gen combine discretionary funds by collaborating on funding an organization.

Grant Sponsorship

Invite next generation members to sponsor grants for review by the board; require a written and/or oral presentation.

Internships

Arrange a one- or two-week internship with another foundation.

Matching funds

Establish a program that matches personal contributions donated by next generation members.

Trustee training program

Develop a formal training program for those interested in trustee service, which could include attendance at conferences, community service, committee participation and board meeting attendance.

Involvement for Ages 22+

Board service

Invite next generation family members to serve on the foundation's board once they have completed a period of training and education. Young adult members can serve as Advisory Trustees, Rotating Trustees, Directors or Associates in a Tiered Governance Model, or as Full Trustees.

The following suggestions are not intended to recommend progressive involvement; they are examples of different approaches.

- **Advisory Trustees:** Invite one advisory trustee to serve on the board each year for a one-year term. Members could be selected based on birth order, ability to attend meetings, demonstrated interest, the completion of a community service project, non-profit experience or other qualifications. Advisory trustees would serve one year and rotate off to allow another next generation member to serve. All those eligible to serve as Advisory Trustees should receive foundation mailings so they can keep up on activities. Advisory Trustees do not normally have a vote.
- **Rotating Trustees:** Invite each family branch to nominate one next generation member for trusteeship. Each branch would decide which of their members to nominate. Next generation trustees would rotate off every three years to allow another next generation member from each branch to serve as trustee. Next generation members would serve as full trustees, with voting rights.
- **Tiered governance:** Adopt a membership structure of governance offering two or three tiers of responsibility. The donors and current trustees could comprise the *members* of the board or first tier of governance, setting the mission of the foundation, making policy decisions, and electing new trustees. The second tier would be composed of *directors* who would be elected by the members. Directors could, for example, vote on grant proposals and budgetary issues. A third tier could be added to comprise *associates*, who would participate in meetings, but would not vote.
- **Full Trusteeship:** After an appropriate training period and the development of criteria for trusteeship, next generation trustees would serve on the board as equal members with current trustees.