Successful Multigenerational Space
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• **Description:** Join this session to delve into a conversation about intergenerational foundation boards and committees. Together, we’ll explore various historic and current trends, challenges and opportunities. We’ll explore the drivers for multi-generational involvement, approaches to governance and decision-making and resources to maximize the multi-generational space in foundations of all sizes. This is an interactive session that will build off the wisdom in the room to advance the field of multi-generational philanthropy.

• **Activities:** Small group work, Large group discussion

• **Presenters:** Kerrie Blevins, Foundation Manager, James R. Thorpe Foundation; Bill Graves, President, The John and Denise Graves Family Foundation; Jenny Johnson, Director, Family Philanthropy Resource Center, The Minneapolis Foundation; and Kate Seng, Senior Director, GHR Foundation
Agenda

• Welcome - Kerrie Blevins

• Panelist Introductions - All

• Changing expectations across generations - Kate Seng

• Thoughts on Advancing the Field – Kerrie Blevins 4

• Tool box and action plan – Kate Seng

Proposed Guidelines

• Confidentiality of discussion

• Introduce self and organization along with question/comment

• Be all-in

• Other?
## Changing generational expectations of directors

<table>
<thead>
<tr>
<th></th>
<th>Historic</th>
<th>Looking forward</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Driver of involvement</strong></td>
<td>Obligation</td>
<td>Ability to have impact, community change</td>
</tr>
<tr>
<td><strong>Role</strong></td>
<td>Relatively passive, receive updates</td>
<td>Active, decision-making authority</td>
</tr>
<tr>
<td><strong>Governance/decision-making</strong></td>
<td>Boards of Directors/Advisory Bodies - on-going</td>
<td>Time-limited Task Forces</td>
</tr>
<tr>
<td><strong>Inputs to decision-making</strong></td>
<td>Learn from other funders/established leaders in the field</td>
<td>Invite those impacted to the table</td>
</tr>
<tr>
<td><strong>Process</strong></td>
<td>Opaque - to prospective grantees and others</td>
<td>Transparent – process and decisions</td>
</tr>
<tr>
<td><strong>Vehicles for impact</strong></td>
<td>Grants to long-established non-profits, many with close ties to founders</td>
<td>PRIs, MRIs, DAFs, grants to smaller, grass roots organizations</td>
</tr>
<tr>
<td><strong>Live out legacy</strong></td>
<td>Following relatively directive donor intent – specific organizations, defined issues, particular programs</td>
<td>Values, approaches</td>
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Discussion Questions – dyads and triads

What about this chart resonates with you in your work?

What should be added?

What do you disagree with?

What else?
Our Thoughts on Advancing the Field

- What can philanthropy learn from other fields of practice about enhancing multigenerational effectiveness?

- Not every rising generation family member wants to or should participate on a multigenerational board. Rising generation board members who want to be there and bring unique skills, perspectives, and attributes to the board need to be able to self-determine their role so they can see how their time and energy translates into impact.
Advancing the Field (cont’d)

• If an organization seeks a multi-generational approach, make sure policies and processes define and embrace that as well.

• Yes, and ....... Identify origin of initial approach, and seek new applications given changing interests, motivations, experiences.
Group Discussion
Building a Bigger Tool Box

• **21/64** “independent nonprofit practice providing multigenerational advising, facilitation and training for next generation engagement, especially within family philanthropy and other family enterprises.”

• **Resource Generation** – “We organize young people who want to transform their family foundations, and the field of family philanthropy, to support social change”

• **Generations United/Intergenerational Center**

• **Johnson Center @ Grand Valley State**, Michael Moody

• **BridgeWorks**

• **National Center for Family Philanthropy Knowledge Center**
Action Plan – Record one action item