

Philanthropy Resources

Getting Started & Current Trends



- [*Family Philanthropy Navigator: The inspirational guide for philanthropic families on their giving journey*](#) (Peter Vogel and Etienne Eichenberger) – An easy-to-use, step-by-step inspirational guide for new and existing philanthropic families to initiate or enhance their journey in giving.
- [*Your Philanthropy Roadmap*](#) (Rockefeller Philanthropy Advisors) – This brief guide is designed to introduce you to the world of thoughtful, effective philanthropy. It's a roadmap for donors and offers an overview of issues that philanthropists may want to consider.
- [*The Stanford PACS Guide to Effective Philanthropy*](#) (Stanford Center on Philanthropy and Civil Society) – A guide written for donors interested in significant and sustained giving seeking a professional level of impact. It includes content and activities to develop your and implement your plan for giving.
- [*Family Philanthropy's New Era*](#) (Family Office Exchange) – History will remember 2020 as the year society's pervasive challenges roared. Two philanthropy experts discuss what they saw in 2020, and what they hope will last for years to come.
- [*The Giving Landscape: 2020 Trends*](#) (National Center for Family Philanthropy) – In a season of change and unprecedented challenges—from the unexpected presence of a devastating pandemic, growing awareness of longstanding racism and pervasive systemic inequality, and a movement to restore democracy—no one is exempt. In the wake of those challenges, the philanthropy sector has evolved and continues to learn. Through conversations with giving families, 10 trends emerge and are helping to catalyze major changes in the field of family philanthropy.
- [*11 Trends in Philanthropy for 2021*](#) (Dorothy A. Johnson Center for Philanthropy) – A series of essays that highlights trends the philanthropy sector has been wrestling with for years, but must now address with more urgency after the chaos and trauma of 2020.
- [*Bridging the Power Divide: How Family Funders Share and Shift Power*](#) (National Center for Family Philanthropy) – What does it mean for a family funder to share and shift power? Here are ideas and questions to help guide an internal discussion on how your policies and practices affect the power dynamics of your philanthropy, and what you can do to alleviate this in your grantmaking, governance, and management practices.
- [*How to Become a Philanthropist*](#) (Ascent Private Capital Management) – Making the shift from a “checkbook” donor to a philanthropist can be one of the most rewarding privileges of wealth. And while discussions about philanthropy often begin in the context of tax or estate planning, start with exploring what you want your wealth to accomplish and why you want to give.
- [*Making a Difference: Private Foundations*](#) (BDO) – One of the many challenges facing wealthy families in today's fast-paced society is the need to meaningfully involve family members, including the rising generation, in the management of the family wealth enterprise. Families can derive great benefit from working together to define their core values and shared vision, and philanthropic work can further strengthen family engagement and commitment.

Philanthropy Resources

Navigating Generational Differences



- [*Giving Across Generations: Maximizing Impact through Family Philanthropy*](#) (Schwab Advisor Family Office) - There is an increasing desire among families to work together to use their resources to solve social challenges. And while a variety of challenges can compromise the work, successful intergenerational giving strategies can foster an ongoing tradition of giving, make an impact on issues the family cares about, and deepen family relationships. In this podcast, learn about what contributes to these successful strategies.
- [*Passing the Baton: Sharing Leadership Among Generations*](#) (National Center for Family Philanthropy) – After considering the factors that shape succession decisions and sharing important lessons from the family business world, Buhl introduces the creative possibilities of shared leadership as well as tips for both senior and next generation members.
- [*Why Did I Make All This Money: Values And Ethics In Family Foundations*](#) (National Center for Family Philanthropy) – Successful family philanthropies may explore their values by asking some of the big questions: who are we? Why are we here? How do we understand our purpose? What is our obligation to others? What can we do to make a difference? In this essay from Splendid Legacy, the founder of the Institute for Global Ethics provides helpful context for these and other important questions.
- [*A Generational Divide at Family Foundations*](#) (The Wall Street Journal) – Quick article articulating where differences arise, which posits that the divide is more about the “how” we support than the “what” we support.
- [*Avoiding Avoidance: Addressing and Managing Conflict in Family Philanthropy*](#) (National Center for Family Philanthropy) – In this issue of Passages, you'll learn about the most common conflicts in family philanthropy, the creative “tactics” some boards use to perpetuate the avoidance, and how you can use simple tools to address conflict in a healthy, productive way.
- [*How I Learned to Stop Worrying and Love Generational Differences in Family Philanthropy*](#) (National Center for Family Philanthropy) – Three tips on how to embrace multigenerational family philanthropy.
- [*Next Gen Philanthropy: Finding the Path Between Tradition and Innovation*](#) (Rockefeller Philanthropy Advisors) – With the goal of inspiring next generation philanthropists to dream and consider new possibilities, and to plan what joy in giving might look like, this guide offers a series of questions and recommendation for next generation donors.
- [*Is Your Foundation Leveraging the Power of Differences?*](#) (National Center for Family Philanthropy) – A discussion guide and assessment tool to help foundation leaders begin essential conversations about the power of differences and determine the level of their organization's readiness for growth.