

Local Program Host Packet and Facilitation Guide



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ABOUT THE GUIDE

Welcome! Thank you for your interest in hosting a Local Program with the Association of Small Foundations (ASF). These programs consist of all sorts of low-cost, informal gatherings that help you connect and learn with other small-staffed foundations in your community. They range from simple networking gatherings at the corner coffee shop to more structured half-day programs on topics of common interest. The sky's the limit, and ASF staff is available to work with and support you every step of the way.

Enclosed you'll find the following to help you start planning:

PLANNING TOOLS

This section walks you through the nuts & bolts of planning a Local Program – it's brief and should give you plenty of ideas for moving forward.

- Why host? Quotes from recent ASF member hosts
- Some recent programs
- Common questions and answers
- Checklist for your own Local Program

RESOURCES FOR FACILITATING

While you may want to invite an outside speaker for a special Local Program, there's also a great deal of wonderful learning that can take place through a facilitated discussion. This section gives you in-depth tools and discussion guides that will enable you to lead a terrific discussion with your colleagues.

- Facilitator's guide
- Topical discussion guides – on succession planning, trustee compensation, advocacy, disaster relief, and more!

ALSO AVAILABLE *FREE* FROM ASF

- Civic Reflection: A Toolkit for Foundation Boards – a guide to using brief pieces of literature as a jumping-off point to talk about the deeper questions in philanthropy

ASF would like to thank the Annie E. Casey Foundation for supporting the development of this resource.

WHY HOST?

In cities ranging from Austin to Boston, San Diego to Seattle, ASF members and other small foundations are meeting around the country. Each year, more than 500 people take part in these informal, local gatherings, hosted by ASF members.

What are Local Program hosts saying about their experiences?

Hosting was a piece of cake!

-Lou Beccaria, Phoenixville Community Health Foundation Phoenixville, PA

The ASF staff provided great support in sharing readings, possible questions, and discussion formats, as well as taking care of the logistics. Try it out. You don't have to be a professor to make it work. And the outcomes – a **deepened commitment to your philanthropy, greater thoughtfulness, and especially a new understanding and appreciation of your colleagues** – are well worth it.

-Albert Keith Whitaker, The Morton Foundation Boston, MA

ASF members can **get to know one another better, build community, and build support for the important but difficult work we are trying to do in the world.** The opportunities for networking are fantastic. [These programs] are a great opportunity to share your passion and interests with fellow ASF members, while making a few new friends in the process!

-Marc Ross Manashil, The Clarence Foundation, Oakland, CA

To anyone in the ASF who is thinking about hosting, I would say "Go for it!" My real interest in being a member of ASF is networking and partnering with others to help make our little planet a better place for all. And I think the need for improvement is something that most of us can agree on!

-Don Ferencz, The Planethood Foundation, White Plains, NY

SOME RECENT LOCAL PROGRAMS

In **Houston, Texas**, a local member sits on the board of the Greater Houston Community Foundation which recently compiled a database of area nonprofits, available to the entire community at no cost. She saw this as a great resource for small-staffed foundations and hosted a gathering at the community foundation for a sold-out crowd of some 50 participants on the topic: What is Due Diligence. A well-received speaker from the community foundation led the program.

In the **Montgomery County** suburbs outside of Washington, DC, an area member hosted a lunch with take-out Chinese food for about 8 area members in the conference room at her office (shared with the family business). Members were simply asked to come prepared to share one thing they're proud of in their foundation work right now, and one challenge they're facing. In a diverse group of foundations, an exceptionally frank dialogue ensued, with a great deal of good advice shared and opportunities for collaboration explored. Members reported wanting even more time together! A similar networking lunch was recently held in San Diego, CA, at an area country club.

In the **Boston area**, members gathered twice in the past year in an historic home on the Boston College campus, where a local member is a professor. Over sandwiches, this member facilitated a Civic Reflection dialogue, using a brief piece of literature as a jumping-off point to talk about central issues in philanthropy. About 20 members attended each program, and gave it rave reviews. Boston-area members are now exploring getting together quarterly for informal networking and collegial support. ASF has a toolkit to help foundations engage in these sorts of discussions with their boards, other grantmakers, and even grantees.

In **New York City**, a local member foundation is extremely involved in issues of international justice. The member hosted an afternoon program at the Harvard Club on the trial of Saddam Hussein, and brought in two distinguished experts to give a lecture, followed by an elegant reception.

In **Chicago**, an area ASF member helped put together a Local Program on a topic he's passionate about: Socially Responsible and Mission Investing. ASF sponsors at ShoreBank provided the speakers and helped secure meeting space in a classroom at DePaul University's loop campus, and an engaging program was held for about 15 local members, most of whom were completely new to this topic.

COMMON QUESTIONS

Where can we hold our Local Program?

There's a great space to host a Local Program in every community. Conference rooms work well – most likely someone on your board has access to one. Frequently the United Way or area nonprofit associations provide free or low-cost space. Colleges and universities often allow nonprofit groups to meet. Country clubs and private rooms in restaurants also work well, or a larger private foundation or community foundation in your area might be willing to open their doors to a group of fellow grantmakers.

What topic can we focus on?

Anything! The sky's really the limit – you can host a program that's just focused on networking and getting to know other small-staffed foundations in the area, or you can pick a particular topic that you're passionate about or interested in learning more about. You can facilitate the discussion yourself (see the ASF facilitation guides at the back of this packet) or invite a speaker who's particularly knowledgeable on a topic.

Where can we find a speaker?

Members draw upon their own networks – affinity groups (e.g. Grantmakers in the Arts), topical experts in your areas of grantmaking, local academics, and so on. ASF can sometimes suggest a speaker, and some ASF members have been so wowed by presenters they've heard at ASF conferences that they've brought them to their own communities!

How much work is it to host a Local Program?

Not too much – really! ASF staff will rely upon your local wisdom to help secure a meeting location and food, and will work with you as much or as little as you'd like on the content of the program. ASF can take care of the administrative work of marketing the program (via e-mail, snail mail, on our website, reaching out to partner organizations, and more), sending out invitations, tracking RSVPs, and so on. Most often, member hosts underwrite the cost of food for the Local Program, but this isn't requisite. Hosting is quite easy, a great way to get to know area members, and a lot of fun!

CHECKLIST

Each Local Program is unique, and the ASF staff will work with you every step of the way to help ensure a successful – and smooth – experience. We hope that this checklist will help make the planning process even easier!

3+ months prior to program:

- Contact ASF office to express interest in hosting
- ASF will put together an invitation list of area members and other small-staffed foundations and reach out to relevant regional association, if appropriate.

3 months prior to program:

- Secure meeting space/location
- Determine program date and time
- Plan details of program together with ASF staff

2-3 months prior to program:

- Edit and approve invitation (produced by ASF staff)
- Plan for food

5-7 weeks prior to program

- Invitation mails from ASF office; ASF begins receiving RSVPs
- Host may make follow-up calls to area members to bolster attendance

2-3 weeks prior to program

- Final program planning based on response

1 week prior to program

- Hosts receive materials, evaluation forms, & final attendee list from ASF
- Confirm food counts, room set-up, any AV or equipment needs
- Pick up name tags, plan for signage (if any needed)

Day of program

- Arrive at location early, ensure room is set up correctly, signs if necessary, set up materials, welcome speakers if relevant
- Serve as member host! Welcome members, set a warm tone, lead introductions, and either introduce speaker or facilitate discussion
- At close of program, thank all, ensure that evaluation forms are completed and send to the ASF office, and be in touch with staff to debrief program

Post-program

- Follow-up with new colleagues and reap the wonderful benefits of having hosted!

AN INFORMAL GUIDE TO FACILITATION

From the Association of Small Foundations

Whether you're leading a discussion with other local grantmakers or with your own board, setting a welcoming tone and facilitating a meaningful dialogue is essential and not always easy. While there is no magic formula that will ensure a perfect discussion, we hope that these tips will help you to head into such events with greater confidence.

FACILITATOR ≠ EXPERT

A common misperception is that one needs to be an expert on a topic in order to lead a discussion or other sort of learning experience on it. Not so! Just with a bit of thoughtful advance preparation, you can lead a group of peers in gaining knowledge about a topic together. For instance, let's say you are interested in learning more about international grantmaking. Although your foundation has never made a grant overseas, you might invite a group of ASF members in your area to learn about this topic together. The ASF staff will help with logistics and invitations, and will e-mail attendees a copy of our Primer *International Grantmaking for Small Foundations* ahead of time. While the tips below won't turn you into an overnight expert, if you follow them, you'll have enough knowledge and skills to lead a quality conversation on a topic new to you.

PREPARATION

First of all, read and re-read the primer (or other resource) on which you'll base your conversation. Scribble notes in the margins. What do you find interesting? Surprising? Thought-provoking? Counter-intuitive? Check out a few websites related to this topic, and print off a few things you find interesting. Then review the discussion guide. Change the order of questions if you'd like, and add more that strike you. You might worry that someone else will come who knows more about this topic – but that's a positive, not a negative! As a confident facilitator, you will call upon and gain from the wisdom of the people in the room!

Then, sketch out your agenda for the gathering – perhaps you have two hours together, including a simple boxed lunch. A sample agenda might be:

11:30 – 11:45	Attendees arrive, get name tags, & settle in
11:45 – 12:00	Welcome & introductions (more on this below)
12:00 – 12:30	Structured discussion, based on your notes
12:30 – 12:45	Break to grab lunch
12:45 – 1:15	More discussion, responding to topics raised earlier
1:15 – 1:30	Closure, time for networking & one-on-one conversations

Of course, your agenda isn't written in stone, and even if you share it with attendees (often a good idea), you can deviate from it. It does give you a loose framework, however, to work within as you guide the discussion.

PHYSICAL SPACE

Comfortable and appropriate space for a discussion is key to its success. Depending on the size and type of group you're gathering, you might meet in a conference room, private room at a restaurant, hotel meeting room, or even your own living room!

When planning, you'll want to ensure that the space you choose to use is:

- **Accessible** – is it a reasonable distance to most attendees' homes or offices? Is public transportation available?
- **Comfortable** – are tables needed for eating? Can chairs be arranged so that all attendees can see one another? Is the room warm or cool enough?
- **Sound** – can attendees hear one another? Sometimes a loud heater or fan in one part of a room can block out other voices, and “private” rooms in restaurants are sometimes only set off by a curtain, making for a loud environment. Be sure to check on this!

KNOW YOUR AUDIENCE – NAME TAGS

If you're gathering other foundations in your area for a discussion, you may know some attendees, but you're likely not to know everyone. Be sure to have name tags and relatively thick markers available, and ask people to write the most important information - their first name - quite large, so that it can be seen from across the room. Then, if they'd like, they can write their full name and foundation name below that. Using attendees' names show that you are paying attention and helps create a warm and trusting environment for discussion.

FOOD

Food is nearly *always* helpful for discussions – people love to eat while learning and talking! But the food needn't be fancy, and you'll need to make some choices as the host/facilitator. Will your foundation pay for the food, or will you ask attendees to cover their own food costs? Does a full meal make sense, or might you simply hold an afternoon discussion over coffee and cookies? If you're gathering in a space without tables, what will people be able to comfortably juggle on their laps? Do you have an option for vegetarians, or for others with special dietary needs? Do you have both caffeinated and decaf beverages? Is water available?

SETTING THE TONE

As the facilitator, you set the tone for the discussion. But even before the discussion, think through some details: who will welcome attendees? Where will they hang their coats? Where will name tags be? Then, once everyone is gathered, kick off with a warm and welcoming introduction – why you've gathered folks together for this discussion, what the agenda is, and how glad you are to see everyone! Don't forget to address practical matters, such as where restrooms can be found, and reminding attendees to turn off their cell phones!

You'll then want to do some sort of introduction. If the group is small, each person might introduce themselves; if the group is larger, you might just have people introduce

themselves to their immediate neighbors for a few minutes. But it's helpful to give some focus to the introductions – you might ask people to share their name and what piqued their interest about this topic. Or, you might ask people to briefly share their experience with the topic at hand, or to share the mission of their foundation, or the grant they're most proud of.

If you're leading a discussion with a group you know well, such as your board, it's still a good idea to start with a once-around, giving everyone a chance to briefly check in with the group, perhaps in response to a focused question related to the topic at hand.

LEADING THE DISCUSSION

So you've done your homework and prepared well, the group has gathered and introduced themselves, and now all eyes are back on you! It's time to launch the discussion. Some key points for leading an engaging, interesting discussion:

- Ask open-ended questions
- Listen carefully, and ask questions back to speakers: "So, Jill, what I hear you saying is X. Is that correct? Does anyone see the situation differently?" You may want to jot notes to re-visit or comment on at the end.
- Don't be afraid of friendly disagreement – lots of good learning happens when folks have differing opinions.
- Often, the most vocal members of a group will dominate. Try to respectfully draw out the quieter members of the group – if you see someone shy trying to jump in, encourage them. Or say, "Joe, what do you think about this?"
- Remember, as the facilitator, your job is to guide the discussion, but you needn't have the loudest nor most frequently heard voice in the room.
- Keep the conversation rolling. Be sure to keep an eye on the time and move along to other questions and topics you want to be sure to address.
- Be flexible and responsive. Remember, your carefully prepared agenda and questions are just a framework, and the group may take the discussion into somewhat different – but equally relevant and fascinating – directions.

A FEW UNCOMMON IDEAS

A full-group discussion is only one model to use, but it's good to have other techniques in your back pocket, either to mix things up, to diffuse a charged situation, or to better engage all members of the group. Some other models for reflection and discussion are:

- Personal reflection or journaling – ask the group a provocative question, and ask them to spend a few minutes quietly reflecting or writing their response to it.
- Partner work – particularly with a group that has a hard time listening to one another, you might partner people off, and give each member of the pair a set amount of time (2-5 minutes works well) to speak in response to the question at hand. Their partner's job is not to verbally respond, but to actively listen. Then they swap.

- Small group work can be helpful with a large group or one with quiet attendees. Give each group a question to tackle, have them spend some time on it, then report back to the larger group on their discussion.

CLOSURE

Congratulations! You're almost done with what was surely a terrific discussion. Everyone has learned a lot and is going away with all sorts of new ideas for their next board meeting. But wrapping up well is just as important as starting well. First and foremost, end on time. If you said that the program would last from 11:00-1:00, start wrapping up at 12:45. You may want to summarize the day's learnings and discussion, or perhaps point people to additional resources. You may also want to do an exercise to help attendees retain knowledge – perhaps have them spend a few minutes writing 3-5 things they learned, or to jot down some notes about next steps they'd like to take. You may also want to do a simple evaluation form for the discussion (ASF can help with this) to get feedback from attendees. Most importantly, thank everyone for attending and for sharing their valuable perspectives. Don't forget to spend a few minutes jotting down your own notes about what went well and what you'd change next time, and whether there's anyone you'd like to follow up with after the event, or if you promised the group you'd send them an article or link afterwards.

FEEDBACK

Speaking of feedback, please let us know if you found this guide helpful, and how we might improve it. E-mail asf@smallfoundations.org to share your valuable insights!

DISCUSSION GUIDES

These discussion guides are designed to help you navigate topics addressed in select ASF materials. They might be used by your board for internal learning and discussion, with a group of other funders in your community, or perhaps even in discussion with your grantees. Of course, they're simply a start – after reading the related pieces, we're sure you'll have plenty of questions of your own!

All titles are available at www.smallfoundations.org. When indicated, discussion guides may also draw from free, publicly available materials produced by our colleague organizations.

Discussion Guides on the following topics are included:

- Proposal Review
- Succession
- Trustee Compensation
- Mission
- Advocacy
- International Grantmaking
- Involving Children In Philanthropy
- Disaster Relief
- Leveraging for Impact

Discussion Guide: Proposal Review

Getting the right proposals in and having thoughtful procedures to vet them are critical for running an effective grantmaking program. Without a process in place, this task can become daunting year after year and be very time consuming. This discussion guide, designed to accompany the ASF Primer *Basics of Proposal Review* will guide you in setting up or refining a proposal review process for your foundation.

1. What things does my foundation typically fund? Why?
2. What is the current proposal review process, if any, within my foundation? If there isn't one, where can I start? If there is one, what improvements would I like to see made?
3. Think about the best proposal you've ever received. What struck you about the proposal itself, the program, or the nonprofit?
4. Think about the worst proposal you've ever received. What struck you about the proposal itself, the program, or the nonprofit?
5. What do I usually look for in a good proposal? What can/should I be looking for in a good proposal (if different)?
6. Consider how the proposal review work is currently getting done in your foundation. Is board and staff time, as applicable, being used effectively and efficiently? Is there anything we can do to streamline the work without compromising quality?
7. Am I currently receiving the right number of proposals, too many or too few? What can I do to change things if I don't feel like I'm receiving the right amount?
8. Is the existing proposal review process at your foundation enhancing your foundation's ability to meet its impact goals within the community or grantmaking area? Are there changes you could make to your grant guidelines or proposal requirements that would allow the foundation to have greater impact with its funding?

Basics of Proposal Review is available at www.smallfoundations.org/Primers.



Discussion Guide: Succession

Succession is often raised as a common concern among small foundations, but it is also one of the hardest issues to address within a foundation. For foundations that plan to exist into future generations or even in perpetuity, good planning for future leadership of the foundation is of crucial importance. And while succession planning is key to any healthy foundation, it can be particularly emotionally charged in family foundations. This discussion guide, designed to accompany the ASF Primer *Making Plans for Succession: What Founders Need to Know*, will help you identify obstacles to succession planning, strategies for planning, and steps you can take now to pave the way for your foundation's future.

1. How was the foundation started and why? What is your role in the foundation?
2. Has the topic of succession been discussed at the board level at your foundation? If so, how? If not, why?
3. What natural personal and/or board-specific resistance do you feel towards succession planning?
4. If your foundation doesn't have a clear succession plan, what is the main reason?
5. What steps, if any, have you or your foundation taken in succession planning?
6. Share a success story or a challenge you face with involving the next generation. Now brainstorm as a group how to work through one or more of the expressed challenges.
7. If you are in the current generation of foundation leadership, what are some of your personal thoughts about passing the reins to the next generation? What are you excited about? Concerned about?
8. Think about how and why the foundation was formed. Is there perceived or recorded intent for the foundation to continue indefinitely or are there clear plans for when it should cease? How does succession planning at your foundation need to be related to these intentions?
9. Think about the future of the foundation board. What is your ideal image of the board in 10 or 50 years? What will the board look like? Who will be involved?
10. What will your geographic community and/or your foundation's grantmaking focus look like in 10 or 50 years? What changes do you see happening? Will these changes require any different sorts of board members?
11. What is the next step (for some, the first step) I personally will take to pave a succession plan for my foundation?

Making Plans for Succession: What Founders Need to Know is available at www.smallfoundations.org/Primers.



Discussion Guide: Trustee Compensation

Recent stories of abuse in the news have raised uncomfortable questions for trustees and staff of foundations. Can we still pay ourselves? How much? There is no, single, hard-and-fast rule for what reasonable compensation is, but it's an important issue for boards to discuss from both legal and ethical perspectives. This discussion guide, designed to be used together with the ASF Primer *Trustee Compensation for Small Foundations* will help you to review what the law does say in regards to compensation, and will provide you with a framework to think about the issues surrounding trustee compensation.

1. What kinds of work do my foundation board members perform?
2. Would these qualify as routine board service? Why or why not?
3. When can trustees be legally compensated? What compensation is prohibited?
4. What are reasons foundations cite for wanting to compensate trustees?
5. What are reasons foundations cite for not wanting to compensate trustees?
6. Has my foundation board discussed trustee compensation? In what detail? Do we have a written policy on the topic? Should we?
7. Why does my foundation choose to compensate or not compensate trustees?
8. What would change in our foundation's work or dynamics if we changed our compensation policy?
9. When deciding whether to compensate trustees and how much to compensate them, what processes in research and documentation should a foundation take?

Trustee Compensation for Small Foundations is available at www.smallfoundations.org/Primers.



Discussion Guide: Creating a Mission for Your Foundation

Everyone comes to philanthropy with a desire to make a positive difference in their community or on an issue area of concern. But the circumstances under which we arrive at a foundation and the outcomes we hope to achieve vary. Creating a mission for your foundation can bring clarity to its purpose, greater impact to its grantmaking and make the work more fulfilling for its leaders. This discussion guide, designed to accompany the ASF newsletter cover story from Summer 2005, “Creating a Mission For Your Foundation: Setting a Course Meaningful to You,” will guide you in your quest to create or refine your mission.

1. Share the story of how your foundation was started. Who started it? When? How was it funded?
2. What was the donor’s reason for establishing a foundation?
3. Does your foundation have a mission (written or verbal)? What is it?
4. If you do have a mission, how was it created?
5. How does having (or not having) a written mission statement help or hinder your foundation work?
6. Has mission arisen for discussion at the board level? How so?
7. What does having a mission accomplish?
8. If you don’t have a mission, or want to revise your mission, what would you hope a new mission would accomplish for your foundation?
9. What fears or challenges (either personal or institutional) do you foresee in creating a mission?
10. How can those be overcome?

“Creating a Mission For Your Foundation: Setting a Course Meaningful to You” and other *Essentials* articles available at www.smallfoundations.org/Essentials.



Discussion Guide: Advocacy

Advocacy is a powerful way for small foundations to leverage their resources, relationships with area nonprofits, and knowledge of local needs to address problems at their core. Foundations are often not aware of the wide scope of things they can fund that fall under advocacy. And advocacy, not to be mistaken for lobbying, actually has very few restrictions. Learn about what is permissible, what is not, and get ideas for how your foundation can ultimately have a greater impact on the issues it seeks to address. This discussion guide, designed to accompany the ASF Primer *Funding and Engaging in Advocacy* will help you to understand how advocacy can provide you with new tools to accomplish your mission.

1. What exactly is advocacy?
2. Does my foundation currently engage in advocacy work? Why or why not?
3. What is your foundation's mission or main grantmaking focus? What are some ways advocacy could further this mission?
4. Explain the difference between advocacy and lobbying.
5. Can a foundation lobby? What is permissible and what is not?
6. What are some ways a foundation can engage in advocacy?
7. Which nonprofits are we familiar with that address the root causes of issues of concern to the foundation?
8. Do any of these nonprofits engage in advocacy?
9. What are some new ways my foundation could engage in advocacy, either on its own, or by working with other nonprofits?
10. How can I legally communicate with legislators to effect change?

Funding and Engaging in Advocacy is available at www.smallfoundations.org/Primers.



Discussion Guide: International Grantmaking

An increasing number of small foundations fund communities and programs beyond U.S. borders and find that these grants are an effective way of leveraging modest resources to make a significant impact. Explore some of the reasons foundations grant internationally, and learn about the tools available to help you do so, as well as the relevant compliance issues. This discussion guide is intended to accompany the ASF Primer *International Grantmaking: Opportunities for Small Foundations*.

1. What are some of the reasons foundations choose to fund abroad?
2. Compare and contrast the benefits and challenges of making direct grants overseas versus using an intermediary.
3. In order to make direct international grants, we have to perform *equivalency determination* or exercise *expenditure responsibility*. Let's define each of these terms and processes to make sure we understand what's involved, and then evaluate which would be easier for the organizations we might fund.
4. What are other ways to be involved internationally beyond making grants?
5. What are the compliance issues to be aware of if making international grants?
6. What other resources are available to learn more or to find intermediaries?

Questions for an internal board discussion:

- Have we ever given an international grant? What was it?
- Why do or do we not give internationally? Could giving overseas fit into our mission and vision?
- What are some of the potential barriers for us to get involved in international giving? Potential benefits?
- Would it make sense for us to use an intermediary or grant directly?
- Is this an area we want to explore further? If so, who will lead the charge?

Questions for a discussion amongst a group of funders:

- Have each person share their experiences with international grantmaking
- Overall, have your experiences been positive or negative?
- What recommendations would those who've done international grantmaking give to those who are considering starting doing so?
- It's such a wide universe of charitable work going on – how do you focus on the issues that matter to you and find the right organizations to support?
- Is there anything we might want to explore doing together as a collaborative or informal giving circle?

International Grantmaking: Opportunities for Small Foundations is available at www.smallfoundations.org/Primers.



Discussion Guide: Involving Children in Philanthropy

New donors, particularly those in the Baby Boom and “X” generations, are involving their children in the family’s philanthropy and volunteering at younger ages than previous generations. This discussion guide, designed to be used with the ASF Primer *Involving Children in Philanthropy* will provide you with some questions for both reflection and planning as you consider how to involve the younger members of your family in the foundation and in the broader traditions of giving and serving.

1. What is your earliest memory of philanthropy or volunteering of any sort – giving of time or money – with your own parents or grandparents? When you reflect on this memory, what sorts of feelings and ideas come does it evoke?
2. How many generations are currently involved in the foundation board?
3. How old is the youngest member of the family currently involved in a formal way in the foundation (e.g., as a trustee or junior board member)? What about in informal ways?
4. What do you see as the connections between grantmaking and volunteering – that is, giving of time and giving of money?
5. At what age do you think it is appropriate to bring family members onto the board? What are some of the ways we can involve them in the preceding years in the work of the foundation? What about in other sorts of giving or volunteering?
6. Are the young people in the family financially literate? Is financial literacy something we see as important? If so, how can we help deepen their understanding of financial issues?
7. Do the youth in our/your family know the story of how and why the foundation was started? Do they know the donor/founder? How can we pass along his or her legacy and values to future generations?
8. Are there people or programs outside of the family who might help us? For instance, community programs on giving and volunteering, online resources, trusted family friends or advisors, or other family foundations in the area needing to engage their kids?

Involving Children in Philanthropy is available at www.smallfoundations.org/Primers.



Discussion Guide: Disaster Relief

While we all hope that a disaster will never affect our own community, we've learned that we simply must be prepared for the possibility. As we've seen with the attacks on 9/11, Hurricanes Katrina and Rita, and forest fires on the west coast, disaster can wreak sudden and profound devastation in any of our communities. Small foundations, which often focus on local giving, are poised to respond to both immediate and long-term needs. This discussion guide, designed to accompany the Winter 2005 ASF newsletter cover story "Giving that Transforms," will help you think through crucial issues in disaster grantmaking.

1. Has a natural or other sort of disaster ever impacted the place in which you live, or previous places you've lived? Talk a bit about the effects on your life and on the broader community.
2. Can we think of a community that came out of a disaster stronger than ever? What were the qualities of disaster relief that allowed such a rebirth?
3. Do you live in an area where hurricanes or tornados frequently touch down? Are there any other obvious possible disasters that your community prepares for?
4. The newsletter article quotes James Joseph talking about the ways in which small organizations (in comparison to larger ones) can be "faster, more focused, more flexible, more friendly, and more fun." Would you say that this describes your foundation? What are the benefits of having these traits, particularly in the context of disaster relief?
5. Has our/your foundation ever made grants in response to disaster? What were they? Were they responding to immediate or more long-term needs?
6. If it makes sense for our foundation to engage in disaster grantmaking in the future, how can we plan and prepare now?
 - a. Will we give only locally, or in other areas in the United States, or even internationally?
 - b. Do we want to make grants to individuals (see the primer on this topic to learn more about the related compliance issues), to local nonprofits, or to collaborations?
 - c. Does making grants for immediate or long-term relief make the most sense for our foundation?
 - d. If we want to, how can we link our disaster relief funding to our mission?
 - e. Who can we partner with (other funders and potential grantees) in case of a disaster? Who would we turn to for recommendations?
7. What other resources are available to us to learn more about this topic – both organizations and written materials?

"Giving that Transforms" is available at www.smallfoundations.org/Essentials.



Discussion Guide: Leveraging for Impact

Whether in your investments or your grantmaking, every foundation trustee or staff member wants to get the greatest return possible for each dollar. But what is the best way to see past the trends and lingo to really make an impact? Nonprofit leaders have a great deal to share with foundation leaders on this topic. This discussion guide, designed to accompany the Winter 2004 ASF newsletter cover story, “Making the Most of Grant Dollars and Time,” will help you think through how you can make the greatest difference in the communities and issues you care most about.

1. What’s the grant we’ve given or the organization we’ve supported that we are most proud of? Why? What about the grant or organization we’ve been most disappointed by? What can we learn from these experiences to apply to our future grantmaking?
2. What is your/our foundation’s annual grantmaking budget? How many organizations did we support last year? What was the average grant size?
3. What sort of grants do we generally give - Project support? General operating support? Capital campaigns? Why?
4. What is our foundation’s mission and/or grantmaking focus? Do we seek grants pro-actively or do we accept unsolicited grant proposals? Why do we have this strategy? Is it working? Are we seeing the sort of impact we’d like to? Is it time to re-structure our grantmaking strategy?
5. How might we have a greater impact on the areas we care most about? What are some concrete steps to move in this direction that we can take in the coming months?

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