



Webinar Series Presents:

***Igniting the Spark: Creating Effective Next
Generation Boards***

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Moderator: **Jason Born**, Senior Program Director, National Center for Family Philanthropy

Presenters: **Sarina Dayal**, junior board member, Tarsadia Foundation; **Shirish Dayal**, executive director, Tarsadia Foundation; **Annie Hernandez**, Youth Philanthropy Connect, director, Frieda C. Fox Foundation; **Katie Marcus Reker**, board member, Frieda C. Fox Family Foundation; and **Zach Whitten**, next gen board member, Lumpkin Family Foundation

Jason Born: I'm pleased now to introduce today's topic and speakers for our call. Throughout this year, the National Center has been looking at important transitions in family philanthropy, and one of the most important transition points is preparing to engage the next generation of family members in shared philanthropy.

For many families, it is important that the next generation not only gives, but gives as part of the family. This family philanthropy webinar introduces an increasingly popular method for preparing the next generation for philanthropic service, the next generation, or junior, board.

The webinar will introduce a variety of purposes for establishing next generation boards, steps for creating a next generation board, and a description of how these boards can be structured. We will also share examples of families that are using next-gen boards as a tool for engaging younger family members.

Joining us today, in order of appearance, to share their experiences in this ever-present topic, are:

Annie Hernandez, Director of Youth Philanthropy Connect, a program of the Frieda C. Fox Family Foundation. Annie previously served as program director of the Lumpkin Foundation, and has a variety of service in public and non-profit organizations in various states.

Katie Marcus Reker. Katie is a Board Member of the Frieda C. Fox Family Foundation, and an alumnus of the Fox Foundation's Junior Board. Katie is a sophomore at Scripps College in Claremont, California, and is a member of the Association of Small Foundation's Next Generation Committee.

Also joining us today is Zach Whitten, a member of the Lumpkin Family Foundation, who has been engaged with philanthropy since the age of 10. Zach, two years ago, became a founding member of the Lumpkin Family Foundation's Next-Gen Board, and I just found out a few minutes ago, he's also a DJ on his local radio station. So, he's a man of many talents.

Next up after that will be Sarina Dayal. Sarina is a junior board member of the Tarsadia Foundation. She is a first-year student at UC-Davis, and she's been doing a lot of speaking on the role of next gen in philanthropy, and we're delighted to have her today.

And joining Sarina and the rest of us is Shirish Dayal, Sarina's dad. [Sarina] is the first executive director of the Tarsadia Foundation, and he'll be joining us today to share a little bit of the adult perspective on how to make next-gen works-- next-gen boards work effectively.

Please join me in welcoming these new and emerging leaders in the family philanthropy field. But before I turn things over to Annie Hernandez, our guest moderator for today's call, let's learn just a little bit more from all of you about who is in our audience today. Jamie (ph), can you load the first poll question, please?

Our first poll question is, please indicate your primary role in family philanthropy, and select all that apply. So, you can be a family foundation CEO, serve in some other staff role, a board member or donor, a next-gen family member, or an advisor to philanthropic families, and if none of these apply, just don't answer.

We'll give a few more minutes, a few more seconds, I should say. Okay, 71% voted, let's - all right. Let's close it right there. Great.

So, we have, as expected, a wide variety of roles on the call today. We had 40% of you say you were a board member or donor, 27% serve in some other staff role, 25% serve in the CEO or executive director role, 13% of you are next-gen family members, and 25% of you serve in some capacity as an advisor to philanthropic families. Great.

Let's do the next question. The next question is, what is your primary reason for attending today's call? And options are, to hear the voice and perspectives of next-gen family members; you are deciding whether or not to set up a next-gen board; you have already decided to set up a next-gen board and want additional advice; or you currently have a next-gen board and are looking for lessons learned from other donors; or you have a specific question for one of the speakers.

We'll wait just a couple more seconds. Okay, great. Let's stop there. And, well, we have a lot of people who are here to hear the voice and perspectives of next-gen family members. 53% of you say that. 25% of you are deciding whether or not to set up a next-gen board. 6% have decided to set up a next-gen board, but want advice, and 17% of you currently have a next-gen board and are looking for lessons learned.

Very interesting. So, actually, almost one in five of the people in the call have a next-gen board currently. Great. Thanks very much.

All right. Next question. And the question is, if you are affiliated with a family foundation, at what age do you typically invite family members to first become involved in the family philanthropy? And the answers are 8 or younger; 9 to 12; 13 to 17; 18 to 24; and 25 or older. Just as a quick aside here, before we started talking with Annie and her colleagues at Youth Philanthropy Connect, we very rarely talked about the 8 or younger category, but Annie has really just realized there are a number of families who are getting started at an early age.

So, we'll wait for just a couple more minutes-- a couple more seconds. I'm sorry. I keep saying that. All right. Let's stop it there. So-- so, it's, again, all over the map. 13% of you say 8 or younger; 13% say 9 to 12; 26% say 13 to 17; 28% say 18 to 24; and 21% say 25 or older.

I'd really love to hear the voice of some of you who are-- who engage your family members at 8 or younger. We'd love to get some of your comments about how that's worked. It's really exciting.

Okay, great. Next question, Jamie? And the question is, who in your family or the organization is primarily in charge of leading youth involvement? Options we have here are CEO or executive director; program officer or some other staff position; a board chair or board member; our next-gen family members; or no one currently plays this role.

We'll wait just a couple more seconds. All right. Let's cut it off there. So, we have 17% say a CEO or executive director leads these efforts; 28% say a program officer or some other staff position; 15% have a board chair or board member; probably only 1 of you said next-gen family member. So, again, I'd love to hear who that person is, and let us know if that's worked well or not. And 37% say no one currently plays this role, which I don't think is a great surprise, I think this is one of those activities that sometimes just doesn't get (technical difficulty) would love to hear some of the speakers today, how they do it in their foundations.

All right, last question. Very (technical difficulty) one, I think. I think I have a sense for what people are going to say on this call. The question is, in your opinion, how important is the voice of youth in family giving? And one option is very important-- that's not-- that's not supposed to be very. First one is most important; then very important; then somewhat important; and then not important. If anyone says "not important," they have to explain themselves in the comments and questions section.

All right. Just a couple more seconds here. Come on, you should be able to answer this question, everyone. Let's stop there. So, we have-- let's see, we have-- 13% say it's the most important voice; 68% says it's a very important voice; 19% say it's somewhat important voice; and no one says it's not important. So, that's great. You've all passed the quiz.

Okay. Well, let's-- without further ado, let's move on and turn things over to Annie Hernandez, who is the co-author, along with Katie Marcus Reker and Kevin Laskowski

of our new "Igniting the Spark" Passages Issue Brief. Annie has been a presenter on many past conferences and seminars, including this monthly webinar series, and we're absolutely delighted to welcome her back. And with that, let me turn things over to you, Annie.

Anne Hernandez: Great. Thank you so much, Jason. We're so pleased to join this webinar today and many thanks to each of you for making the time to learn more and learn with us about this really important topic.

Our plan for the webinar is to get a brief overview of "Igniting the Spark" issue brief, then introduce you to some involved next-gen members, and their engagement models, and then have Shirish with the Tarsadia Foundation, give his perspective and insights working with their youth board, and then we'll finish with some Q&A.

As you'll see on the slide in front of you, next gen matters. Most foundations, especially family foundations, are grappling with succession and what that means for their organization. These are some great resources, especially if you're making the case for starting next gen work in your foundation. The topic is important is what we're taking away, and I'm glad to know that the majority of you agree on the call today.

Katie, can you tell us more about what a next-gen board is?

Katie Marcus Reker: Sure. So, this is Katie. A next-gen board usually takes the form of a foundation within a foundation, or a grant-making committee with the foundation.

Usually a pool of money is set aside for next-generation family members to distribute. It can also be involving next-gen members of the family in the current grant-making process in some formal way, and often it's a way to prepare younger members for board service in the future, and a way to train them and have them be involved in the foundation before they're old enough to be on the board.

Anne Hernandez: Great. And Katie's a terrific example of especially that last point, in that she started as a junior board member of the Frieda C. Fox Family Foundation when she was 12, and has now joined -- now that she's 18 -- has joined the board of the Frieda C. Fox Family Foundation, and serves as the junior board advisor, which we'll give you a little bit more details about later in the webinar.

Katie and I went through the issue brief, and we tried to identify 10 considerations for next-gen boards or younger next-gen involvement. And we thought that we would share these with you so that you can listen for examples of these in the youth stories that you'll hear.

The first consideration, as you'll see on the screen, is give it purpose. Working with youth and working with a next-gen board, really ensuring that it teaches mission and values is important. You'll hear a little bit more from Zach about how the Lumpkin Family Foundation does character training, starting at age 5 with their youth, but this could be as simple as identifying and sharing values of each family member.

Katie Marcus Reker: So, the second consideration is involving youth in the creation of the next-gen board. And that can be as simple as just talking to them about what they would like to be more

involved in, and how they would like to be included in the foundation, and starting that conversation from the very beginning and throughout the evolution of the next-gen board, involving the youth and letting them help make the decisions is always a really important part.

Anne Hernandez: And the picture that you're seeing right here is actually of the youth leadership team of Youth Philanthropy Connect, which has really led the effort of developing Youth Philanthropy Connect. So, we also have a youth leadership team that you see members of here, which includes Zach, at the microphone, who you'll hear on the call, as well as Sarina on the far right that you'll also hear today.

Next, our number three, is providing training with context. There's lots of different ways that we've found that families are training their next generation. The one that we find most popular is doing something in context like going on a site visit and debriefing that learning or volunteering at a grantee organization. The advice that we would really have is determine what needs to be learned, and then develop an experience with the youth that helps to teach or model what you're wanting to be learned.

Katie Marcus Reker: The fourth consideration is creating a relationship with the board. And at the Frieda C. Fox Family Foundation, we've always had an open door policy with the board of directors, which always made it seem like the board was not this kind of scary, superior institution, but more like a partner in our work, and the junior board-- as a junior board member, I was never afraid to ask questions and participate in our grant-making and be a part of that policy because of that relationship and that support system.

Anne Hernandez: Number five consideration is provide age-appropriate components. As Jason mentioned, we've been targeting ages 8 to 21 for our work with next-generation members, and what we found is that the reason we've chosen that target age range is that we found a number of families that are starting with next-gen boards between the ages of 8 to 10, and one of the things that we found is there seems to be this natural break between the ages of 8 to 12 and then those that are 13 and older.

And mostly that just is based on reading comprehension and vocabulary. But I would also let you know that what we've found is that the younger members definitely rise to the occasion to be with their older cousins, or older next-gen board members. It's helpful to pay attention to the different ages and think about what's appropriate, based on your individual youth that you're trying to engage from your family.

Katie Marcus Reker: The sixth consideration is to engage kid-friendly adults that know when to get out of the way, when appropriate. This is really about having adults who are there to guide the kids through the process, but also letting them foster their own vision of their philanthropic identity, and allowing them to explore that process, in and of themselves.

And this could be as simple as starting to facilitate discussions surrounding the mission and values of the foundation, but allowing the kids to also just discuss it on their own, and not necessarily tell them exactly what it is, but start these discussions and have these conversations and allow the adults to get out of the way, when needed, and allow the kids to kind of take over the process, in a way, but also be there to guide them.

And this photo on the screen are staff members of the Dekko Foundation, who you can see are very kid friendly by this photo.

Anne Hernandez: And the seventh consideration is balancing opportunity and obligation. This is probably one of the most delicate, and yet important, balances to maintain, especially if you're including only youth from your family. Most of the families that we've talked with have let us know that there's always someone who doesn't necessarily want to be involved. And it's been really important to make that okay, and yet to keep an invitation, an open invitation for involvement.

One strategy that we've heard is to send everyone an email or Facebook update on activities, knowing that some are going to be involved in those activities and others might just be paying attention from a distance.

And, once again, I think engaging the youth in the creation and the leadership of the work that they're doing definitely helps with their engagement. I think making it fun, yet challenging, and allowing them to create relationships among each other really helps the learning be more-- most productive.

Katie Marcus Reker: The eighth consideration is connecting personal philanthropy and volunteerism with the family philanthropy. And these are actually next-gen board members of the Tracy Family Foundation, and this is them at the Youth Philanthropy Connect conference, and they were involved in making these sock kits for organizations that serve homeless in the area, and then went and did that in their own community at home.

And this is-- this point is also facilitating kind of a broader conversation surrounding causes and philanthropic giving and allowing these discussions to kind of connect youth-owned volunteerism and causes with the foundation's philanthropy and connecting their own personal causes with the broader foundation's grant-making and allowing those discussions to happen, as well.

Anne Hernandez: And the ninth consideration is provide hands-on grant-making opportunities that show impact. This picture is from a Frieda C. Fox Family Foundation junior board site visit to a strategic partner of the foundation that's called Children's Nature Institute. Because the junior board members learned about Children's Nature Institute at the board meetings, one of them actually supported Children's Nature Institute with their junior board grant.

Just like many of the Millennials in the next-gen donors research, youth like to be hands-on. Another example that I think a number of foundations have used started with the Lawrence Welk Family Foundation making bicycles together with the youth who would receive them.

So, making this connect to the place or the end user really equals and shows impact for next-generation members.

Katie Marcus Reker: And the last consideration is building peer networks and learning opportunities, and this photo is actually from the Youth Philanthropy Connect conference and shows, I think, representatives from four different foundations.

The best example of this in my experience was in 2010 the Fox Foundation met with the Lumpkin Family Foundation. You know, we had a retreat meeting, and we were able to talk to each other and learn from each other, and then both foundations left the meeting and then were able to reevaluate their own grant-making models and learn from each other, and we both took pieces from each other's models and reevaluated and modified our own grant-making model.

And learning from each other is always a really wonderful experience for the youth, who especially feel like they're working in little bubbles. Because this kind of work is not necessarily something that you share with your friends at school, because they really don't know what it means. So, meeting other youth who are involved in the same kind of work and have the same experiences is always a really valuable experience for them.

Anne Hernandez: Thank you, Katie. So, we hope that these considerations have been helpful and really helped hit the high points from the issue brief. We now want to take this down into some specific case studies.

So, it's my privilege to introduce Zach Whitten, who is one of the next-gen members from the Lumpkin Family Foundation, to tell you a little bit more about their model and foundation. So, Zach, I'll let you take it away.

Zach Whitten: All right. Hello, everybody. My name is Zach Whitten, and I am, as Annie just said, a member of the Lumpkin Family Foundation. And so, the Lumpkin Family Foundation, we're based out of Mattoon, Illinois, but our family is very dispersed geographically. I'm going to school in Virginia. I have cousins in New York City, in Florida, in California. So, we're all over the country.

We have our mission statement right up there on the slide and it's that we support people pursuing innovation and long-lasting improvements in the environment, health, education, and community access to the arts. And this is something that, as junior board members, we've all been conscious of. Even though we might not have it memorized, we all have realized it.

And so our sixth gen, which is kind of our youth group, is very widely dispersed. We range from ages 3 to 24. I, myself, am 20. So, I'm on the higher range of that.

And our next-gen efforts are, as the slide says, they're led between the committee on trusteeship and our program-- foundation programming officer. So, it's kind of a balance between that and the youth taking leadership. One of my cousins, in particular, she is a very-- she is one of the bigger leadership members out of, like, the youth, who takes the lead and will help do stuff like that.

And so, next slide would be great.

All right. And so, here's just some of the things that Lumpkin Family Foundation has in place for youth. We have, starting off with our 5 to 1 matching gifts program, which is basically the idea that if you make a donation, a personal donation out of your own pocket with your own money, the foundation will match that up to a 5 to 1 donation. So, if you donate \$200 to an organization, the foundation will match that 5 times, which is a huge-- which is really cool, to be perfectly honest. It's a really cool program.

We have the sixth generation committee, which is ages 10 to 15. This is what I started out as. This is where I got my start in philanthropy. And, basically, the idea is that we each give \$100 to each member, and then we all present different non-profits we found and are interested in, and then we go around and we vote and we give money to the ones we like the most. And we usually take our \$100, split it up, and then put how much we feel into each foundation. And so, usually each foundation will get some amount of money.

And then there's the next generation education fund, which is ages 16 to 21, and this was founded by me and my cousins a few years ago, because the sixth generation committee was a really great idea, and yet we felt that it was getting a little bit-- we were getting a little older, and we wanted to take on something a little more substantial, a little more challenging. And so, this is the result of that. We do \$7,500 for youth education grants, and we focus it in an area where a sixth generation member lives.

And so, then we have the Molly Lumpkin Award, excuse me, where we will nominate a sixth generation member who has done at least 10 hours of community service, and who has shown like a positive impact upon their community.

We also have character and philanthropic and financial training that starts at the age of 5. And I remember doing this since I was a kid. And basically just the idea is that there's character building and just kind of-- it's just fun and games and kind of, you know, just teaching you about, you know, kind of character-- it's kind of self explanatory. It's about character building, and it's about understanding, maybe, the reasons you do philanthropy, kind of the reason it's important, and then there's also things like financial training where you understand finance and how complicated financial structures actually work and not to be intimidated by big words, basically.

And then we have the individualized outreach plan, which is the ideal of, you know, kind of like, hi, happy birthday, here's a book that is age appropriate that you should read about philanthropy. And it's really kind of a cool idea and so, there's a lot of great literature that comes through that system.

And then, we have our committee and board eligibility. To be a member of the foundation, you have to be 16 years old, and to be a voting member on the board, you have to be 21 years old. And so, that's coming up very soon for me.

And then member survey, we-- just every two years we will do a survey to try and get some feedback, what people liked about the meeting, what people didn't, to make sure that the next gen is involved, make sure previous gens like it, basically just to get data, to see what everyone thinks, and to push forward from there.

So, yeah, that is what I have to say. Thank you all for listening to my spiel.

Anne Hernandez: Great. Great. Thanks, Zach. I really appreciate the age-appropriate opportunities for involvement that Lumpkin has laid out, and I really like the recognition of volunteerism within the model. So, thank you very much.

Zach Whitten: Yeah, thank you. I agree.

Anne Hernandez: I'd now like to turn it over to Sarina from the Tarsadia Foundation to give us a little bit of background about their foundation.

Sarina Dayal: So, hello. My name is Sarina Dayal, and I'm from the Tarsadia Foundation, and we are located in Newport Beach, California, and we're actually very fortunate that all of our family lives here in, like, the Orange County, California, area. So, it's easy for us to communicate and having meetings and everything together.

So, my role is just I'm a junior board member. And our mission is the Tarsadia Foundation supports non-profit organizations with programs and projects that provide educational opportunities for the underserved, supports health and well-being of the community, and exists to employ the employable through economic empowerment.

So, our mission highlights education, economic empowerment, and healthcare, and if you think about it, that's kind of broad, and it covers a lot of areas, which, for the junior board is great because there's quite a few of us. We have 22 youth between the ages of 9 and 21, and we all have different interests and different passions, so when allocating our grants, we keep in mind our mission to make decisions, but it's very open, and we have like a lot of opportunities to give to different types of foundations.

And so, next slide please?

The first thing I think I'll talk about is the work we do. So, we do grant-making and we do service projects locally and globally. And how we make decisions on what grants we choose to fund or the service projects is through our meetings.

So, we have meetings at least four times a year, if not more, and sometimes we have meetings with our adult board, and sometimes we have meetings on our own, and what we discuss at the meetings is usually we have one-- we have a grant cycle that's once a year, annually, and so we'll have like a meeting designated to discussing like the grant applications that we received. And then we have follow-up meetings to discuss the-- like going on site visits and what happened with our funding.

And-- but we also-- at our meetings, we try to discuss-- we try to learn about what the adult board is doing. So, we'll have-- like about half our meetings are with the adult board. So, we'll all meet together and we'll discuss things as an entire foundation, like if there are entire foundation service projects we want to do. And then we'll split up at that meeting, and we'll go into like an area and have our own meeting and the adults will go into their own section and have their meeting.

And so, the junior board meetings are usually run by our executive director, but also we are given time during the meeting to discuss things amongst themselves. And we don't have any leadership roles within the-- within our group, like no one's facilitating, but we-- so I think it's okay. It's actually good, because it makes it more open, and there's no-- but sometimes, like, it doesn't work because there's no facilitator, so it gets kind of slow. But that's when our executive director, he steps in and he tries to facilitate our discussions.

And our decisions are usually-- when the family makes decisions are unanimous with general consensus or a majority vote. And if we have something we need to discuss and

someone disagrees, we let them speak, but that's how we run our meetings to do our grant cycles.

And then service projects that we do locally we all try to find projects around the Orange County area that our family's interested in, and different people will bring up ideas or stuff they've heard about at their school or something, like some organization that they've worked with, and we'll try to bring that into the foundation and then do something with that organization as a foundation or--

And then, other things-- another thing that's interesting that we like to do is our international (inaudible). We've done two already, and we're planning a third this December. And we think it's a great opportunity to go-- we treat it as a retreat for the family, because we're all together and we're somewhere else, but, also, it's an opportunity to give back to the community elsewhere. We try to pick a location that a lot of people are interested in going to and passionate about and that's affordable.

And it's a great learning experience, because it puts you into different situation than just being at home and doing something like a one-time thing, because it's-- we'll go for like a week and we'll work with an organization and our executive director really puts together the trip. And they're a lot of fun, but also a great learning opportunity.

And then we have leadership development opportunities like public speaking coaches, and we've gone on a learning retreat where we have speakers that tell us about-- that train us and we do like value exercises and discuss our mission statement as a group. And those are really good.

And then, we have meetings-- we try to have them every month with a family circle, and we-- to talk about what's happening with the family and the foundation, and well, it's really nice and easy for us to have meetings and a lot of opportunities to discuss what we're doing because we're so close to each other.

So, that's it. So, thank you.

Anne Hernandez: Great. Thank you so much, Sarina. The international service trips are a really special hands-on learning experience, and I also really like the public speaking coaching. I think that that's an important context-related learning opportunity. So, thank you so much for sharing.

Sarina Dayal: Well, thank you.

Anne Hernandez: Now, Katie, you've already given us some insights into the Fox model, but help us understand a little bit more by filling in the gaps about the Frieda C. Fox Family Foundation.

Katie Marcus Reker: Of course. So, this is Katie Marcus Reker. I am a board member with the Frieda C. Fox Family Foundation, and I also serve as the junior board advisor. And as Annie and Jason both mentioned earlier, I served on our junior board from the ages of 12 to 18.

Our foundation's mission is to maximize the potential of children and youth in Los Angeles and Santa Clara counties. We are located in Studio City, California, but we have family members geographically dispersed.

And the junior board was founded in 2006, really as a way to engage the family's youth and prepare them for future involvement. The board has always put an emphasis on including the kids, even when we didn't have a junior board, and this was really a more formalized way for the kids of the family and of non-family to be involved in the grant-making program.

So, the junior board includes both family and non-family members ages 8 to 17, and then we have a varsity junior board that involves ages 18 to 21. And I'll talk a little bit more about that on the next slide.

And our junior board is supported by a board member in the role of junior board advisor, which is my role, and I serve as kind of the liaison between the junior board and the board of directors, and I work with the kids, as well, on their grant-making program. And we also have the foundation's director of youth philanthropy, which is Annie's role.

So, our junior board, which is ages 8 to 17, each member is individually allocated \$2,000 to make one large \$2,000 grant or two \$1,000 grants to a mission-aligned non-profit organization of their choice. They work with the junior board advisory to find an organization.

They fill out a nomination form that kind of takes them through the organization's mission, the program that they want to support, why they want to support it, how is it mission-aligned. It kind of takes them through all of those steps as kind of a vetting process. And then they present their nomination form and their grant to the board of directors at one of our annual meetings for final approval.

And they're also encouraged to go on a site visit, whether that be before they decide on an organization or after they make their grant, as a follow-up and check presentation. As you can see in the photo, that is one of our junior board members making a check presentation to one of his grantees.

And then we also have a junior varsity board, which is kind of the next step for youth ages 18 to 21 who aren't quite ready for board service, even though you can be on the board starting at 18 years old, who still want to be involved in the foundation's grant-making, but aren't quite ready for that next step.

So, in this they are still allotted the same \$2,000 but no longer have to fill out the nomination form, as that form was really created as a way to help guide the youth through the process, but by age 18 they're kind of veterans of this process and don't need that-- as much guidance as the younger kids. And they are also allowed to give to a non-profit in the community they school in, because we do know that most of our youth will be in some other community.

For example, Jamie (ph), who is one of our junior board members, just recently this year started college at Brandeis University, and now, instead of making a grant in Los Angeles

or in Santa Clara County, she can make a grant in the Waltham-Boston area to stay connected to her own community there.

And then we also have-- we put an emphasis on training, which is kind of how Youth Philanthropy Connect started, and we have this yearly thing and then we also do training in context. So, we do group site visits and group meetings where we talk about the grant-making process as a whole, and the youth are also really encouraged to stay involved with the overall foundation's grant-making and sit in on meetings and understand the foundation as a whole.

And this kind of goes with the committee and board eligibility. So, once you turn 18, you are eligible for the board of directors. And that is what I did. I stopped being on the junior board once I turned 18 and moved on to the board of directors. But you can also do the junior varsity board through college.

But junior board members are welcome to sit on committees during the grant-making process and voice their opinions. While they don't have an official vote, in the end, the board is always very supportive of hearing the next generation's opinions and asking them what they think of certain grants, and reading the applications and being a part of the foundation's grant-making as a whole, as well as their own individual grants in the junior board's grant-making program.

Anne Hernandez: Great. Thank you so much, Katie. I love in the Frieda C. Fox example how youth are involved-- were involved in the creation, as well as having youth-friendly adults, like you, serving in a junior board advisor role. So, thank you very much.

So, now that you've heard the opportunity to hear from a couple-- from the three different foundations and their models that we have on the phone, we wanted to ask Katie, Sarina, and Zach, a couple of different questions, and let them build off of each other's comments.

So, Zach, I'd love to start with you on this question and then I'd ask Sarina and Katie to jump in. Can you share what's been your favorite part of being on your next-gen board? Or, in general, being involved in your foundation's youth philanthropy work?

Zach Whitten: Well, for me, the most-- like the best part about it was to just be able to see the real impact that the grant-making me and my cousins do, the impact it has. Because just to be able to see that what we're doing can have a legitimate impact on people's lives is really rewarding, and it's really motivating to continue to work.

And so, that's why I like doing site visits, and that's why I like to do follow-ups, is because it's not just reading a piece of paper, thinking that sounds good, and just kind providing grants. It's visiting and meeting people and kind of getting a real human connection and a personal understanding of what is going on.

And I think it's a real rewarding experience. And, yeah.

Anne Hernandez: Thank you. Sarina?

Sarina Dayal: Yeah, so, I agree with Zach. Like while the meeting aspect of our youth board is great, and like it gives us career and learning opportunities, I think that the hands-on opportunities are the best. I like, like, when we do and we have (inaudible) opportunities where we just get to meet people and talk to people and like going on our site visits and just like hands-on, face-to-face contacts with our different organizations and non-profits. I think that's the best part.

Anne Hernandez: Thank you. Katie, do you want to add on?

Katie Marcus Reker: Yes, I definitely have to echo what Zach and Sarina said. I think the hands-on experiences and site visits really make your grant-making real.

But I also really love -- and I mentioned this a little bit earlier. But I love that our board meetings and retreats have always had an open door policy. So, no matter your age or position within the foundation, you are invited and encouraged to sit in on these meetings and voice your opinions in a safe space. And this was really a huge part of my training as a junior board member, was that even when I was 8 years old, I was sitting in on board meetings and listening and I learned by experiencing our grant-making process, just by sitting and listening to everyone discuss grants and read the applications and talk about the foundation's business.

And as I grew up and I got older, I was not only more knowledgeable in the foundation's business, and the kind of philanthropy world as a whole, as a result of this, but I was also more confident in my ability to understand our grant-making and voice my opinions about it. And I was able to share even more as a result of that, and it really did prepare me for board service in the end.

So, I've always really loved that kind of training with context experience within our foundation.

Anne Hernandez: Great. Thank you guys so much. I think those are some really, really solid-- makes a very solid case for more hands-on opportunities, for sure.

Sarina, can I ask you to kick off answering this question?

Sarina Dayal: Um-hmm (affirmative).

Anne Hernandez: What hasn't worked well, or what would you change about your next-gen board or youth philanthropy experience?

Sarina Dayal: Well, so my youth philanthropy experience, I think that the number one issue that we have as a next-gen board is communication. So, while like being close is easy, and like, you know, but-- and we can have like face-to-face meetings often, but communicating like when and how we want to do things, I think we're in a weird place where, okay, the age range is like 9 to 21. So, some people are on Facebook. Some people aren't really on email, but a lot of the adults are on email.

So, I think communication has been something we've had to play with and figure out what works best for people, and how to like contact people and set meetings up and

whatnot. So, I figured like email is good, but also like a Facebook group is good, so, I think that's something that we had trouble with.

And also, what doesn't work is if people are not interested. I think with philanthropy you really have to have a passion and be interested in doing it. So, it doesn't matter if you're just a part of the family. You can't just be a part of the family and on that board. You have to be a part of the family, but also interested in participating and passionate-- and have an interest in going and doing volunteer work and wanting to learn more about different organizations. And so I think that's something that has to be there.

And then lastly, with our meetings, when we have our own youth meetings, we don't really have a youth leader, so when we're trying to just work with our own meetings, sometimes they drag, and sometimes it's not really going anywhere. And like some people try to-- try to take the lead, but it's not-- but that's something that hasn't worked, either.

So, I think what Zach was saying was, I think they have, like, facilitators. Something like that would be good for us to implement.

Anne Hernandez: Great, thank you. Katie and Zach, do you want to chime in?

Zach Whitten: Yeah, this is Zach. I'll chime in with something. I think for us, kind of on the vein of communications, a little bit different, dealing with the, like, just some of my older-- the older members, so, like 16 or 21-plus a little bit, I think the hardest thing for us has a little bit less communication, more just logistics.

Because we don't live anywhere near each other. We are usually separated by a few hundred miles. And so, we just kind of accepted that in order to do things like site visits or to do a long-term, productive meeting, we just need to be together. Because there's only so much you can do digitally. We have Facebook. We have emails, and we-- being family, we all have each other's numbers and we just text each other and get back as a system of communication, but it's a smaller group, so it makes it a bit easier.

But I think for us the hardest trick is just getting everyone together. When we first started the next six gen education fund, we had this great idea to do it over Martin Luther King weekend. It's a long weekend. Everyone can get together.

And this was about three years ago. Most of us were in high school. So, we had a three-day weekend. It sounded like a great idea.

Fast forward three years. We're now, most of us, in college, but the two of us who aren't, one of them isn't even in the country right now.

And so, that leaves us getting right back from spring-- from winter break, having like three days of school, not having a long weekend, and then flying to a different end of the country, again. And it does not work very well.

And so, we've had to reformulate how we're going to do that. For us, we've found that the summer months, when we're not all in college or high school, whatever it may be, those work much better because we're not trying to balance, you know, all your classes,

external commitments, on top of just not being there for a weekend and you don't need that extra stress. So, the summer, we think, is going to be the best way to have a-- you know, to meet and to stick together and to do this, because, you know, committing a weekend right after winter break when everyone's trying to get back into the swing of things at school can be a real difficult thing.

And that's my two cents.

Anne Hernandez: Very helpful. Katie, how about you?

Katie Marcus Reker: Well, I think our-- probably what we've had to deal with the most with kind of issues surrounding that is the obligation versus opportunity question. And I am a huge proponent of making it an opportunity and not an obligation at all. And if there are people who aren't interested, don't force them to do it. It's just-- it's not going to work.

And I think in the beginning, you know, we involved, you know, all of the youth in the family and there were several of them who just turned out to not be nearly as interested as we had thought and kind of drifted away from it, and trying to keep them involved was difficult. But once we kind of came to terms with that, you know, opportunity and not an obligation, it got a little easier.

And, of course, we've added steps to our model and to the process that have made easier for younger kids, as they've grown up with it. When we started our junior board, I think the youngest member was 11, and then a couple years in we had an 8-year-old join us, and then we had to kind of grapple with, okay, well, now we have this much younger member, how are we going to modify this to make it work for her?

And she definitely rose to the occasion, but, you know, adding a nomination form that kind of takes everyone through this checklist of their-- the organization that they're nominating, and kind of going through the process and looking at what's going to work for this age group and what isn't, as those things-- as those problems kind of arise, as the situations come up, is something that we've really had to deal with and work through.

And it's worked very well. So, just being open to evaluating that is always very important.

Anne Hernandez: Terrific. Well, thank you so much, Sarina, Katie, and Zach. Your wisdom and your experiences are so valuable, and you make all of us so proud. So, thank you so much for your thoughts.

Looking at the time, I'd like to now turn over the presentation to Shirish, who works with Sarina at the Tarsadia Foundation, to share some of his adult insights on being involved in doing this work. So, Shirish?

Shirish Dayal: Hi. Good afternoon, everyone. Thank you, Annie, and thank you Jason at NCFP, for bringing this platform here and such an important platform that we're at.

So, starting off in lieu of time, I'll try to do this as quickly as I can, and give you my views, my thoughts or advice or perspective in leading the next generation.

So, just a brief background. You know, we started doing our formal grant-making at the Tarsadia Foundation maybe about four-- we're in our fifth year, right. So, it started just about four years ago. So, really just came into the field of philanthropy really fresh, which really was kind of a great thing for us, because it gave us this open, blank board to start with.

So, initially, we started with the landscape of just figuring out what we wanted to do, and the focus was really go get the family involved and really the next generation involved. So, the experience that we've had in the last four years with the next gen has been phenomenal.

There's been wonderful ups and wonderful experiences that have just exhilarated us, and, at the same token, there's also been a lot of challenges, and a lot of frustrations, which I'm sure is no secret.

With a lot of the things that we do, one of the things that I'd like to share with you is how did we decide to start with the age. Because that's always been-- that's been kind of the-- one of the topics we've grappled with as far as when do-- when are they ready to really start? And we kind of just started-- I think it was really-- there wasn't any science to it, but we just, huh, we have a young member who's 9. We had a couple that were a little younger than that, and we thought that's an appropriate age.

So, we really started bringing them on, starting at 9, saying they need to participate or are invited to participate in the junior board activities. And we-- the reason behind that is we just figured that the young are so eager. They're honest, and they are full of so much energy, and their learning curve is so great, that we figured that, you know, we've got to start them right away.

And I think some of the-- for example, I know from our experience and attending the junior board members, I have realized that the younger generation, the younger they are, the more they contribute. You know, my expectation was that the older generation would be the role models for the young one to learn from, but in a sense, sometimes it was actually the reverse, where the young members were actually much more engaged, asking appropriate questions, and really concerned. And so, it was kind of a fun thing to watch.

The other experiences we've had in creating our different models is-- some of the picture, going back, I bypassed a little bit. So, the picture that you see there is actually from one of the first projects we did the very first year, which was a playground build, and then we made this little garden here, and then we did the street signs and just pointing different directions.

And so, really, the experience has been, it's a crossroads. It's a playground and there's so many things to choose from, and that's the beauty of it, with the next generation, and leading them, that there's so many different avenues. And you've already heard from the experts, from all these three different foundations and the kids that this is, you know, this is really-- there's so many things to do that let's, you know, you've got to get out and just try whatever it is.

And so, we've tried several different things within our models. We've had-- you know, with our grant-making you've heard about, our international service trips, you know, with

the leadership development. We've even done some discretionary granting, retreats, and, of course, Youth Philanthropy Connect, which we connected with and really think this is such a valuable piece of it.

Out of that, how do we-- you know, the experience for me with the next gen is, what's the most important part of it -- and this is just one of several. Hearing the next gen over the last four years, we've figured -- and it's been-- I think they've answered the question several times that hands-on is what they really like. So, doing the grant-making is great, but it's not always the fun part of it.

The-- I think, though, one of the things that I think that has been great is the international service trip. That's been the biggest learning curve for us in doing that, where it really brought everything down to a very humble level of us going out and for the family to a) not only be together, but then do service together and learn about different cultures, different part of the world, different needs that exist in the world and how it, all of a sudden, just really brings everything kind of close and smaller together that it's really the same everywhere, and also value. And we've had some really great experiences with our service trips.

As mentioned before, with the areas of needs to work on and the challenges have been, of course, communication's always huge. You know, the social media-- we try to use social media. We try to use texting. We're using a Facebook pilot, but it's an ongoing situation for us.

Even commitment and enthusiasm have been challenges for us, but we're working on it, and I think we're creating some amazing ways in leading some of these things, as I'll share with you in a little bit here.

The biggest lesson that I think that we've learned in my experience is really letting-- listening to the youth, really, and letting them lead the way. That has been the most effective method, I think. You know, it's eye opening. There's no secrets, and the family bonding and the appreciation is so phenomenal.

So, moving on to the next slide, we really kind of-- you know, we had to take a leap. We had to do things that we weren't familiar with, weren't comfortable with, and we wanted to bridge that gap between the youth and the next gen, or just with everything that we do.

As mentioned before, opportunity versus obligation. You know, you've got to try, try again.

Some of the lessons learned I wanted to share with you. Just a couple of quick lessons is family dynamics. Family dynamics have-- are a huge part of, I'm sure, you know, with all of us. We all have those things. And that's been something that we've tried different things with, but, you know, we've had situations like Sarina had mentioned about the no facilitation piece, the meetings not being led by us, so, you know, we had a lot of enthusiasm getting going, and then we realized, like, okay, we need to slow it down. We're so excited and we're so passionate, but we need to take things a step at a time and do a few-- you know, a few key things.

But that's always been a big challenge for us. So, we certainly have learned a lot with our family dynamics in our meetings, as well as our retreats and our international service trips.

And one of the things we've done with that, in preparing, is giving them tools. And so, as mentioned before, we've done the coaching. One of the things we learned is, when we first started, we really didn't press them enough about the foundation and our missions and our values, because we were just starting, as well. So, the next gen wasn't in tune.

So, this last year, we really took a training focus on-- with our retreat, was really focusing and making sure everyone was well versed in the mission and the values, and now we're really redressing that, now that we've had some several years of experience, we're actually able to, now, get them to engage, and they have a couple of years of experience now, so they understand the nature of philanthropy and of family philanthropy, and so, they're reworking those.

And we've also done a financial literacy piece, as well, which has been a huge, huge important part of learning. When they read the grants and go to sites and they're reading these LOIs, there's always numbers involved, and not everybody's all on the same page. And so, we want to make everybody comfortable.

And also, to be able to publicly speak about the foundation, we thought, was very important, as everybody should be very comfortable about being able to give an elevator speech and say, okay, this is who we are. Here's what we do. And we didn't do that in the beginning. And that was something we missed in the very beginning.

The other thing that we've done is, of course, a great success is doing the volunteer projects. So, they're so important, and one of the things we learned is, you know, we are, parents, sometimes our role can be role models for the kids, and so we know that a lot of times during these opportunities that the kids were not engaging, but then the parents weren't engaging, either. If the parent was engaging, the kids were engaging, and so we really have to step up and have the family-- really the parents also be the leaders, as well.

And that was something that was a lesson learned. We weren't doing that. And we're also trying to teach our parents and our families to really be involved and be the role models for these.

So, that's-- you know, there are several things, of course, on that building bridges. One of the success stories, of course, is our international service trips, and our family retreat, of course, which is really great bonding and learning, very refreshing, and a lot of fun. You know, we try to incorporate all that fun into our cycle, as well.

So, I guess the next slide, really, the payoff, really, to me, in the end, is why is this so important, and this is from our first service trip we did to India, in Chennai, the leprosy colony, and I look at this picture, and I think, well, gee, this is-- you're looking at our future. This is our future. So, that's that very important perspective that we want to teach the kids, is just family unity, and that leads into a community responsibility.

But just giving them that opportunity to shape the future, and also we're exposing them to these things. And, as mentioned earlier, you know, not everybody's going to give 100%.

Somebody might give 5%, somebody might give 10%, but do something. And that's what we've been trying to instill in different ways, in learning the ropes and listening to other foundations.

You know, early on when we first-- when I first started, it-- you know, we didn't know that so many family foundations were doing next gen involvement and doing great work that's there such a resource of information. But when I first came out, I really didn't know where to look, per se, and we kind of scoped and found a few things here and there.

But, you know, this is such a great opportunity for everybody to share what they do. Just even-- I mean, I've heard great ideas, even today, that, well, gosh, I didn't think about those things.

So, this, to me, is really exciting. I've given you just a taste of some of the things we've done. And it is important. We do want to ignite the spark for the next generation, because they are our future.

Anne Hernandez: Thank you so much, Shirish. I love the payoff of family unity leads to community responsibility. That's very powerful.

So, Jason, let me turn it over to you at this point for our question and answers.

Jason Born: Terrific. Thank you, Annie, and thanks to all of our panelists today. We are going to invite all of you now in the audience to take part in our open Q&A session for the next half hour or so. Again, you can ask questions or share your own suggestions by using the question box of your control panel on the right side of the screen. We've already gotten a number of questions in, and thanks to those of you who have submitted questions.

Our first question actually came in from one of the registration forms for the call. I'm going to start with Annie on this one, and then invite other people to chime in if they're interested.

And the question is, although our foundation covers registration fees for all, plus all travel expenses for our next gen, we do not currently reimburse trustees for their travel of hotel expense for our twice-year meetings or attending conferences. This is a financial concern for our rising next gen who seek to become trustees with a tension between differing concepts of financial hardship versus lifestyle choices, as well as a fiduciary concern, with a tension between maximization of funding for grantees versus encouragement of next-gen participation and learning. Wondering how other foundations have dealt with this.

So, essentially, the question is, should we cover the cost of travel for these meetings for our next gen, and how broadly do we define when travel is related to foundation activities and how do we balance that versus your goals for maximizing your grants to the community?

Annie, you're our leader of your Youth Philanthropy Connect network. Can you talk a little bit about what some of the members of your network-- how they answer this question and maybe if others have specific examples, they can chime in as well?

Anne Hernandez: Sure. Okay. Well, and this has looked a little bit different in every single foundation, and it also depends on what ages you're engaging your different youth, and at what point they can become members of the foundation or trustees.

So, one thing that I would point folks to is, within the issue brief there-- on page 18, there's some legal considerations for who pays for what at what age, and how can you do that, depending on involvement. So, I think there's-- I'm really happy to here in this example that the foundation is covering registration fees for all members of their next gen, and I think there are some broader legal considerations that most foundations that we've gotten to know have needed to work through surrounding that.

In a lot of those examples, I've seen where other generations will help pay for the expense. So, it becomes an expense that's incurred by grandparents or other family members, but isn't necessarily expensed to the foundation.

But I think especially if the meeting and training through conferences is really seen of value to the foundation and is expected of trustees, my advice is that -- going back to our comments of needing to engage those who are being affected by this work in the work -- I think it may mean a look at your board policies related to, you know, what expenses you're paying and for whom.

Shirish, I don't know if you have any other comments from your experience with this at Tarsadia?

Shirish Dayal: Yeah, I mean, certainly exactly to reiterate what you've said, I mean, yes, one of our-- the family-- the international service trips that we do, you know, they are done-- each family pays their own way for those international service trips.

But, yes, anything conference-related where they are actively involved and engaging their time in the grant-making process, the foundation does cover. And-- but the service trip is one of our things. And the reason behind that, too, is you know, we've created the feel with the family foundation -- you know, we're a little diverse in the sense that we have members that are invited to participate as kind of our advisory board on our family. We total almost-- you know, 45-plus or 50, with the adults and the youth, and so, we want them to have ownership and this is part of-- you know, something that they're doing as a whole.

And so that (inaudible) where we have-- we do the international service trip, and everyone does, it's an investment on their part where they're engaged in family. So, that's just a little information on that side.

Jason Born: Great. Thanks, Shirish.

We have a whole bunch of other questions. Let's jump right to our next one. I think this is going to be a simple one, but if the three families' foundations representatives could quickly answer this, the question is, is service on your next-gen board a choice for kids, meaning-- I assume that means, can people opt not to participate?

Why don't we go quickly with Zach of the Lumpkin family? Is it a choice or is it an obligation?

Zach Whitten: For us, it's definitely a choice. We-- it's actually for our older members, we have all been doing it so long, that it doesn't really seem to be much else of an option. We all kind of feel like we are a part of it, regardless, but as a matter of how involved you are, like you can be of it and just get the emails, but you really are too busy and you're really not involved.

And so, that's kind of how we see it. You know, just by inheritance and growing up in the foundation, you are a member, but if you are too busy to be an active member, then there's no pressure to be there, to be that. You know, we just want, if you have the time, you have the commitment, we want you involved. We'd love to have you. But we recognize that things can get really busy with life, and there's no, like, oh, if you're not part of the board, then you're out kind of thing. So, that's how we try and run things.

Jason Born: Great. How about you, Katie? What does the Fox Family Foundation?

Katie Marcus Reker: Yeah, it is definitely a choice, and we have family members who are not involved at all, and that's perfectly fine. And we also have non-family members who, obviously, don't have any familial obligation. You know, my mom was the executive director at the time of the founding of the junior board, and I was offered this opportunity and I took advantage of it, but we have a couple other non-family members who may be, you know, kids of family friends, or, you know, close kind of extended family, but not actually family, who have really stepped up and wanted to.

But it is a choice and it is definitely looked at as an opportunity to take advantage of if you would like to, but not at all an obligation if you are not interested.

Jason Born: Great. And, Sarina, yeah, I agree with Zach. Ours is, also. It's definitely a choice, and like the volunteer opportunities or any opportunity as a group and then whoever wants to take them up, and whoever has the time, and is willing to, can participate in any of the activities. Everything is definitely a choice. So same thing with Zach and Katie.

Jason Born: Great, thank you. Next question that came in, in advance of the call, what is the best way you all have found to give each of the younger family members and equal voice, despite differences in age, experience, and personality, i.e., talkative or dominant personalities versus less vocal or quiet. I think, actually, Sarina, you talked a little bit about that.

Annie or Shirish, any advice for that?

Anne Hernandez: This is Annie, and I think-- one thing that I really like about the Frieda C. Fox model is that each youth gets to do their grant individually, and a lot of the models also have them doing it collectively. And I think one of the things that the individual grant process provides is that, you know, depending on the personality of the youth, they get this process. It's their own.

So, you know, they feel-- they feel important going and making a site visit and, perhaps, submitting a grant check, for instance, and so, I think having something that allows them to be cultivated individually, with that as an example, I think, is one way to do that.

I think the other thing is, either working with one of the older family members to be a facilitator. I know in the example that Zach gave, he mentioned that one of the older family members has really kind of taken on a facilitator role within their group, and I think, you know, even in thinking about our Youth Philanthropy Connect leadership team, I actually facilitate the calls, so it really allows voice to be had by everyone that's on the call.

So, I think that's going to differ, depending on every single organization and kind of who are the different people that you're engaging, but I think paying attention to that is very important.

And I think, you know, it also evolves as the youth age. So, just because you start out as a staff member facilitating that, doesn't mean that it's going to be that way the next year. You can really cultivate that leadership and skill to be able to handle it.

Shirish Dayal:

Hi, this is Shirish, and just to chime in a few things. Yeah, it is-- it's a huge challenge, and every time I've-- we've had the next-gen meeting, there's always those few that really voice-- or, you know, the ones that stand out and always speak, and then there's ones that never speak, and it's an ongoing challenge.

A couple of things that we've done. I think one is-- we've tried a couple of things, anyway. We've broken up our site visits where we actually partner one-- you know, in different age groups, as well as leadership skill groups in terms of who's a spokesperson, who's not, and putting them together and doing these site visits. And so-- and giving them some guide to conduct the interviews. So, it's slowly bringing about where they are.

And over the years, we've seen great maturity. In the beginning there were very few that were speaking, and now we have quite an engaged next-gen board meeting, where, pretty much, I would say, a good 80%, 70%, 80% voice. There's always work in progress, and therefore, we bring in those tools with those-- you know, because a lot of them, most of them, are shy. They don't speak. They're not sure. They're insecure. And so, we provide these executive coachings, whatever tools we need. If we see them and we notice that there is a chance, we try to figure out what kind of work and work on it individually and one-on-one, as well.

And we also have set up scheduled meetings, a new thing that we're doing is one-on-one. So, where I will meet with each of the individual board members one-on-one to kind of be able to have-- to listen to them and hear their voice. So, they don't always in the meetings.

Jason Born:

Great, thanks. Zach, do you guys experience this at all in your next-gen board activities?

Zach Whitten:

I mean, a little bit, but, you know, we just do what we can to kind of keep it under control.

Jason Born:

Great. Great. Actually, a couple of questions have come in about holidays and birthdays. And this question is, I would like to know how holidays and birthdays and related activities and giving around those events are incorporated in the youth philanthropy in families with children or preparing for junior board service? And then another question came in, I think, Zach, you had mentioned that a part of your program is that children--

excuse me, kids and younger Lumpkin family members get a book on their birthday, around philanthropy, and someone asked if you had any specific suggestions for what those books might be?

Zach Whitten: I-- I do not. Sorry.

Jason Born: It's okay. You know, let me help you with that, actually. We have a-- the National Center has a Pinterest board where we have shared a whole range of books around philanthropy for youth and teenagers. And I encourage you to check that out. It's a family giving Pinterest board.

Anne Hernandez: And, Jason, also on the "Igniting the Spark" page, on the blog, of NCFP that you mentioned, there's a list that also has books. And a lot of those books are from the Lumpkin book project. And that's another thing. If you'll let Jason know, we can actually email you the list of the books by age that are mailed out.

Jason Born: Right, great. Annie, do you have any other examples of what families have done to incorporate the holidays and birthdays into engaging youth in the family foundation activities?

Anne Hernandez: Sure. Another strategy that can be used are the matching grants, which I think was another thing that the Lumpkin example had. So, you know, the money that can be matched, for instance, in the Lumpkin example is, it could be birthday money. It could be money that you've earned. But I think that that's a great way that you could tie something that's happen personally to something that the foundation could be involved with. So, I think matching grants and tying it to birthday money could be used for that.

I know the-- actually one of the younger members of the Lumpkin family, every year on her birthday, that's what she chooses to do is she'll send that money in for a matching grant.

I've also seen, going with the book, the ultimate gift, they have a number of products, and one of those is a birthday-- a birthday product that helps kids think about, you know, what are the things that they're passionate about, and what they'd want to give to for their birthday, and I've also seen, in some of the other, raising charitable children books, you know, examples of how to use a birthday to fund raise or do some sort of volunteer project through a birthday party.

There's also a really good product from the Youth Philanthropy Initiative of Indiana that's called the Philanthropy Box. So, it's this character, Phil, and his family.

Jason Born: Yeah, right.

Anne Hernandez: And so, that also has some good activities that could be pulled out and pretty easily utilized, especially during the holidays.

Jason Born: There's also one other resource that Lisa Parker from the Lawrence Welk Family Foundation, "The Hip Family Guide to Giving at the Holidays," or something like that.

And that's also on our Pinterest board and on the page that you mentioned, Annie. So, there's a lot of good suggestions in that guide, as well.

Another question we got, which I think is directed to Katie, Zach, and Sarina, primarily, and it's about how you do it, basically. The question is, given that societal and academic pressures on youth require so much of them these days, how do young family members in high school and college find the time and manage to stay engaged in the work of the foundation in the midst of all of your other time-consuming commitments, school homework, sports, music, et cetera?

Katie, why don't we start with you first? You, actually, have moved on from the junior board to the main board, and I'm sure that requires even a little bit more of your time. And, actually, I'd love to get a sense from each of you about how much time per month or week or year you spend on philanthropy-related activities? And then, how do you do it? So, Katie, let's start with you?

Katie Marcus Reker: Sure. Well, I think the Fox Foundation has always made it-- it has never been a huge time commitment. I mean, we have two meetings a year, and in preparation for those meetings, you will spend a little bit of time, you know, working with the junior board advisor and possibly going on a site visit and, you know, creating a PowerPoint presentation to present to the board.

But other than those two meetings a year and the small amount of prep for it, we really don't have that much, you know, monthly time commitments or anything like that. It's fairly low key. We do have-- every now and then, we'll have a site visit day where we all come together and, you know, go on a site visit, or go see two organizations, and we have the Youth Philanthropy Connect conference, but on a day-to-day basis or even on a monthly basis, there really isn't that much that's required of junior board members.

And, of course, you can step it up if you really enjoy that. For me, I have really loved being part of this, and, as a result, I've taken on more responsibilities than other junior board members in the past, just because I really enjoy it, and it has almost become one of my extra-curricular activities.

But it really-- as long as you make it a-- you know, a big enough commitment that it does matter and the kids want to do it, and they're going to be involved, but not too much that if you add it on to all the other stuff they're doing, it's going to be way too much for them. I think just balancing that is important, and also talking to the kids about how much they think they can take on. Because if you communicate with them and you say, okay, well, what else are you doing and how much time do you think you can put into this, they'll tell you what they need.

I don't know if that helps or anything. I'm sure that Zach and Sarina can also talk a little bit about it. But that's been my experience.

Jason Born: Great. Sarina?

Sarina Dayal: Yes. So, I agree with Katie, like everything-- I think it comes back to it's a choice, and so just based on how much you can give. You give however much you (technical difficulty),

based on how much time you have, and, like, just what you're comfortable doing and how you can balance your schedule, along with giving. It's a choice in that sense.

And we have some people who are a little more involved than others, because they have more time. And they get a various opportunities. You know, the more interested you are, the foundation makes it really easy to do things on your own, if you want. You know, find different volunteer opportunities, find different organizations, or, if you have the time to find your own or they provide opportunities for us and we can just go to those, and depending on when and if you can, then you can go and-- so, it's really easy, and, you know, if you have more time to be involved in any project that really interests you, then you can.

If you want to be on the planning committee for planning our service trip, or if you want to plan a volunteer activity somewhere you can, then you can be more involved in that sense, or if you just want to attend events that are available, then you can just attend those. And so, it just-- it's just balancing and doing what you can and just like whatever you can from the heart, it's like it's best.

Jason Born: Great. Zach?

Zach Whitten: All right. For me, it's a bit-- I mean, it's similar. I mean, I think we're able to do it because we, with the Lumpkin Family, we really do a lot of our work over the summer. Like we have like a one-week kind of like meeting in some location. That's where we get a lot of the work done. I think that's one of the reasons.

And the second that I've been doing this since I was a kid, like 10, and I've been going to these meetings since as long as I can remember, and so, I've always kind of-- I became invested in them when I had free time. I'm 13, I have enough free time to do whatever. So that, by the time I'm in college now -- because to be perfectly honest, if I was being introduced to this, this year or last year, I would not have time to add it, because I have-- I have a tendency to overbook myself.

But you find time for something that you care about, and I care about this quite greatly, because I think it's a real important thing, and I really enjoy doing it. And so, it's not a huge time commitment. It's a couple hours every month. There's one or two months where there's a lot of work-- not a lot, but the majority of your work is focused in one or two months.

And so, I think that if you realize, already, that you enjoy it, that it's good, and that you want to invest your time in it, it's very doable to just kind of have some level of commitment. But that's why I really emphasize that having kids join early, start of high school, middle school, somewhere in there, is really important, because understanding the value of it or kind of just learning if you enjoy it yourself before you're already super busy is a really valuable thing.

So, that's how I think about that.

Jason Born: Zach, really helpful advice, and I think a lot of people are probably nodding their heads out there. You're absolutely right. Why introduce something right when someone's going off to college?

Zach Whitten: Right.

Jason Born: It's one of the busiest times of your lives. It's a really important point that you make. Great.

Zach Whitten: That's true.

Jason Born: I apologize. We have so many other questions coming in, but we are just running out of time, and I want to give each of our panelists a chance to give some closing comments and words of advice. I'm going to let Annie kick this off and start with you, Annie. Annie, do you want to talk a little bit about some parting advice and ways to (technical difficulty)?

Anne Hernandez: Great. So, thank you so much, Jason, and what great questions. You'll see here a compilation of some of the advice that we've been given as we've talked to other foundations about ways to get started. I hope that many of these shined through in the presentation, and, you know, I would really echo that you start small, based on what works for your family cultures, and the ages that are represented.

And also, I think, one way to do that is by letting them meet other youth. So, all three of our presenters today have been a part of the leadership team of Youth Philanthropy Connect and are at our annual conference every year. And so, you know, feel free to come and meet all of these youth and many others that are just as incredible, and they inspire each other and all of us, as adults, as well.

So, Katie, Sarina, Zach, and Shirish, may I have each of you give a parting word of wisdom, as well? So, Katie, let's start with you.

Katie Marcus Reker: I think my biggest piece of advice is just to communicate with your kids, because they will tell you exactly what they need from you in the process, and exactly what they want to do. And starting discussions with them surrounding the foundation's mission, the community you serve, why this is important, it will all help them really figure out what they're doing. And just keeping that line of communication open is so important.

Anne Hernandez: Great, thank you. Shirish, can I have you give your parting word of advice?

Shirish Dayal: Sure. Again, thank you, Annie, and thank you, Jason, and Katie and Zach, as well, and Sarina.

You know, I guess my really parting advice is really don't wait. I've heard too many stories with other family foundations that have waited to get their next gen involved, and so my parting word is just don't wait. Whatever form it is, do it. And also, and secondary to that, is to reach out. Because I know when I first started, there are so many resources and opportunities out there, and I've seen a lot of foundations just hesitate or just afraid, but, you know, don't be afraid to take that leap.

Reach out, talk to somebody. We're all here. There's several-- you know, National Center for Family Philanthropy is here. So, several organizations and a lot of resources that are

on the website. So, just reach out and talk to somebody personally, individually, and that'll make a big difference.

Anne Hernandez: Thank you. Zach, how about your parting words of wisdom?

Zach Whitten: I'm going to just kind of echo-- echo that and just say, show the youth, really kind of earlier on, that there's value in the philanthropy. So then what can come out of it. Show them the good behind it, because as great as it sounds, in principle, telling somebody very busy that they can make a difference does not have the same impact as showing somebody what they can do.

And I think having someone learn that at a young age is, a huge thing. It has a huge impact on their life, and will really be reason to inspire as they grow older. So, I think that's my last parting words of wisdom for everybody.

Anne Hernandez: Thank you. And, Sarina, how about you?

Sarina Dayal: I agree with everything that was said, and also, you know, just this whole idea of giving by being a part of the youth board, it becomes a part of you, and a part of your lifestyle, no matter, like, what career you're going into, or whatever you're going to do in your future. I think it's really-- it's really important to have this value of giving. So, everyone should do it, and start young so that you make it a part of your lifestyle.

And also, that just going through this youth board, having a youth board, it's all a learning experience. And we're also still learning. So, you just have to try trial and error and everything works out.

Anne Hernandez: Terrific. Thank you all so much. What great words of wisdom. Jason?

Jason Born: Great. Thanks, everyone, and I just want to read one comment that came in from someone who said, I just wanted to add how impressed I am with the leadership, passion, and commitment that these three young people exhibit. And I think that's a terrific note to end today's webinar on.

As a reminder, for those of you with access to the National Center's online knowledge center, if you'd like to share today's discussion with your board or colleagues, both the webinar recording and a written transcript and slides will be posted on the knowledge center sometime next week.

Please also keep an eye out for our participant survey, which will be sent later this afternoon, and it's so value to us in learning how to make these webinars a more valuable resource for all of you.

Finally, we hope you all can join us again in a few weeks on Thursday, October 10th, at 12 noon Eastern time, when we'll feature the topic, "Creative Strategies for Family and Board Education."

Thanks again, everyone, and thanks, again, to (inaudible) Technologies for their support of today's webinar, and please remember to join them on their follow-up webinar next week, and join us next month.

And, finally, enjoy these last few days of summer. Thanks, everyone, and we will talk to you soon. 'Bye.