

21/64

TOPICS INCLUDE:

Personal / Family

Governance

Investments

Grantmaking

Education

Advocacy

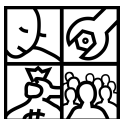
52 WAYS TO TAKE ACTION

Personal / Family

1. Learn about your family's history and philanthropic legacy
2. Write, video, or somehow record that history and legacy
3. Learn what the family foundation means to each family member
4. Articulate the values that inform your philanthropy
5. Develop a personal giving plan
6. Write a personal check to an organization about which you care passionately
7. Find a seasoned funder (outside of your family) to serve as a mentor
8. Offer to mentor a younger funder
9. Figure out the role you want to play in your family foundation
10. Keep a journal of your philanthropic journey
11. Work with older generation family members to develop a succession plan
12. Think about what kind of change you want to see in the world and how philanthropy can be a part of that

Governance

13. Attend a family foundation board meeting
14. Read through the foundation's charter and bylaws
15. Meet and get to know each member of the foundation's staff or team of advisors
16. Log onto www.boardsource.com to learn more about board member responsibilities
17. Develop an agenda for a board meeting with the board Chair
18. Volunteer to facilitate a family foundation board meeting
19. Plan a family foundation retreat
20. Ask critical questions about foundation policies
21. Work with your board to create young people-friendly policies
22. Learn regulations about self-dealing



Investments

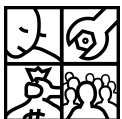
22. Meet with your foundation's investment advisors and money managers
24. Learn about your foundation's investment policy and strategies
25. Find out about socially responsible investing
26. Inquire about your foundation's shareholder advocacy
27. Vote a shareholder proxy
28. Develop a mission-related investment plan for your foundation

Grantmaking

28. Read about the 5% minimum payout obligation and ask about your foundation's payout rate
30. Read at least one grant proposal and present it at the foundation meeting
31. Learn how to read operating and project budgets
32. Conduct a site visit to one of your foundation's grantees
33. Volunteer for a non-profit organization
34. Offer to serve on a non-profit board of directors
35. Recommend a grant to your family foundation
36. Write a grant request to understand what it entails
37. Learn to say "yes" and "no" to grant requests
38. Organize a giving circle

Education

38. Attend new trustee seminars and conferences at COF, ASF, and your regional association of grantmakers
40. Check out the Foundation Center library near you or online & learn how to navigate its databases
41. Attend events offered by Resource Generation and other funder affinity groups
42. **Utilize the www.2164.net Resources section**
43. Subscribe to a philanthropy publication such as the Chronicle of Philanthropy
44. Become an intern at another family foundation (or non-profit)
45. Attend diversity training to learn how to better work across race, class, gender, and age divides



21/64

Advocacy

45. Find out about legislation affecting philanthropy and your foundation
47. Write an OpEd for your local paper about an issue of community concern
48. Make a challenge grant or matching grant to stimulate change
49. Host a gathering of your grantees in order to introduce them to other funders
50. Invite funders in your community to study a new issue of concern with you
51. Lend your name to an organization or issue to demonstrate your support
52. Contribute to the community foundation in your area