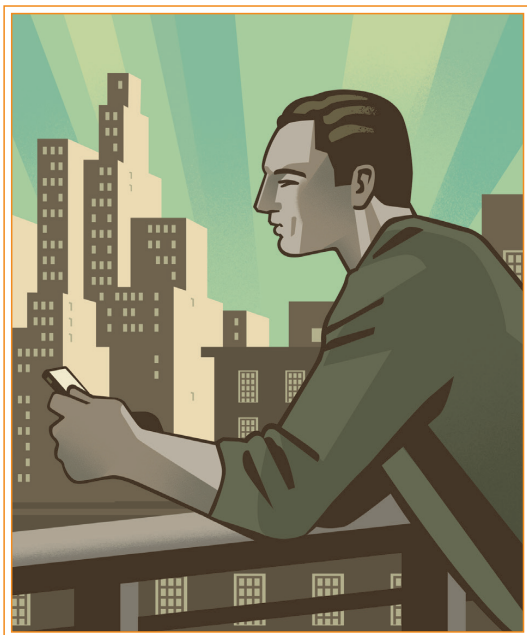


# NEXT GEN PHILANTHROPY

FINDING THE PATH BETWEEN  
TRADITION AND INNOVATION



ROCKEFELLER PHILANTHROPY ADVISORS  
PHILANTHROPY ROADMAP

Philanthropy usually prides  
itself on good manners  
so we'd like to begin by  
begging your pardon.

You see, we have some unvarnished truths to deliver:

Whether wealth is a blessing largely depends on you and your approach to it. Wealth can present significant problems; it can also bring tremendous freedom and the unusual ability to pursue the projects of your dreams.

Some families view philanthropy as a way to bind everyone together and teach family members a sense of responsibility. Usually parents and grandparents have this vision. While philanthropy can be a unifying force, it is no silver bullet.

Enjoyment and meaning in giving begin with individual motivations and values. People with wealth share the challenge all human beings face—how to find your own individual way, your own path toward meaning, while also maintaining a connection to family, community and history. You must stand on your own even as you stand in the great and ever-evolving succession of ancestors and descendants.

Philanthropy starts with an inward journey—an exploratory mission into the heart and mind.

If you face the expectations of parents or grandparents or must decide about your role in an existing family philanthropic tradition, self-knowledge can help you engage with, and even influence, family tradition.

The title guide of this series, *Your Philanthropy Roadmap*, can be a useful planning tool to identify goals for giving and clarify your approach. The Roadmap, which can be found online at [rockpa.org/your-philanthropy-roadmap](http://rockpa.org/your-philanthropy-roadmap), focuses on five key questions:

**WHY ARE YOU GIVING?**

**WHAT DO YOU WANT TO ACHIEVE?**

**HOW DO YOU THINK CHANGE WILL HAPPEN?**

**HOW WILL YOU ASSESS PROGRESS?**

**WHO WILL JOIN YOU?**

This guide offers another series of questions that every next generation donor should carefully consider, as well as recommendations based on the past experiences of other next gen donors. It is not designed to tell you what to do or how to think. On the contrary, it starts from the assumption that you are the captain of your destiny when it comes to philanthropy. Our goal is to inspire you to dream and consider new possibilities, to plan what joy in giving might look like.

Written for emerging philanthropists and for those who are established but considering a slight-to-massive makeover, we want to reveal the potential—as well as the challenges—of giving. And we want to do it from the fresh perspective of what some people call the next generation: those who must decide how to honor the legacy of the past while creating a legacy of their own.

## A BROADER DEFINITION

In common usage, “next generation philanthropy” simply means charitable giving pursued by people aged 18–40. Usually, the term refers specifically to people who inherit wealth. Sometimes it includes those who are expected to participate in established family philanthropy.

We would like to suggest broader parameters, without reference to age and with deference to each individual to decide whether or not the term fits. Here’s our un-definition:

**NEXT GENERATION PHILANTHROPISTS ARE PEOPLE WHO SEE THEMSELVES AS DESCENDANTS RATHER THAN ANCESTORS, WHO WANT TO USE THEIR WEALTH TO BE OF SERVICE TO OTHERS.**

We believe the term is not bound by age or inheritance. Many donors today, while creators of their own wealth, recognize themselves as “next gen” because their methods of giving are innovative—breaking away from the more traditional philanthropic strategies of the past. While the case studies included in this guide are exclusively those of wealth inheritors, their experience and advice is pertinent to anyone who identifies as a next generation donor.

# HOW DO YOU PERCEIVE YOUR WEALTH?

The largest wealth transfer in history is just beginning. One estimate says Baby Boomers will receive an intergenerational transfer of \$11.6 trillion—that includes both inheritance and inter vivo gifts.\* A huge amount will go into philanthropic organizations, including family foundations, and this money will also greatly impact the generations following the Boomers.

You may have received an inheritance some time ago. You may know that money is coming in the future. Or you may have earned your money. No matter the timing or the means, the key philanthropic question for the next generation is: how do you perceive your wealth?

Is it a burden? A resource? Something to be hidden lest you be accosted for donations? Something to acknowledge publicly as a powerful lever to encourage good works?

For most people, money means freedom. It provides the ability to make choices. Yet, your own expectations—and those of family, friends and peers—can seem to constrain that freedom. Most everyone has an opinion about the proper use of large sums of money—but few know what really abides in your heart, or what it's like to bear the responsibility of spending wealth wisely.

Here, philanthropy can provide a real option. Not because giving away money automatically confers meaning and joy. In fact, thoughtless giving usually has a candy bar effect—the initial

rush gives way to a kind of donor's "sugar low" and eventually, even regret. No, philanthropy can be an option for the "next generation," because it politely but unapologetically asks questions of great relevance: Who are you? What motivates you? Why are you here? How can you best serve—not just your community or the world, but your own sense of what really matters?

Philanthropy helps us see wealth as a tool. First, for self-definition. Second, for service. Third, for correcting what you think is wrong in the world. This is not about guilt. It's about fulfillment. Of course, any individual can seek to find their way without practicing philanthropy. But most people will benefit personally by going through a process of considering what his or her own philanthropy might look like.

No one can be constrained—even by the weight of tradition and great wealth—if they have enough clarity about their own values.

\*"Inheritance and Wealth Transfer to Baby Boomers," Boston College's Center for Retirement Research, commissioned by MetLife, December 2010.

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**BOLDLY FORGING A PHILANTHROPIC PATH**  
**FARHAD EBRAHIMI & THE CHORUS FOUNDATION**

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**F**arhad Ebrahimi feels comfortable with the label “next generation” because he feels it recognizes a natural tendency for younger people to be attracted to new approaches. His advice to other potential next generation philanthropists is simple and positive: “It’s easier than it sounds.”

Very few of the activists at the Occupy Boston encampment in late 2011 controlled a foundation which had tens of millions of dollars in grant-making capacity. Even fewer wore a t-shirt that said: “I am the 1 percent and I fully support the 99 percent.”

“I wasn’t going to be there and not be transparent about who I was,” says Farhad.

The 30-something activist and donor is at home with irony. He takes bold stands—and big risks—as a funder and yet adopts a self-questioning style around the resources which enable his giving. Very public as a champion of social change, he is soft spoken in conversation—very aware of the “power dynamics” that come with privilege.

Farhad’s giving began as a result of his family’s generosity. His dad, Fred Ebrahimi, helped grow Quark into a publishing software leader as a partner with founder Tim Gill (creator of The Gill Foundation and other organizations). Farhad received significant wealth from his parents before he was 21. It was both a responsibility and a burden.

“I feel very strongly that I was given more financial resources than I would spend on myself and, frankly, more than I could spend on myself without being abjectly wasteful,” he says.

His eventual response was to create a foundation that focuses on building relationships. “One of the things that makes the funding community dysfunctional, to be blunt, is a lack of real engagement and a lack of authentic listening to people doing the work,” he says. “It’s not enough just to support them financially, but we want consider ourselves part of the movement as well.” He not only works as an activist on issues he believes in, he frequently goes on site visits with grantees. “To do anything effectively,” he says, “it really helps to know the folks you’re going to be working with.”

**HERE ARE SOME KEY POINTS  
IN HIS JOURNEY SO FAR**

**MISSION EVOLUTION**

In 2012, after an 18-month strategic review, the Chorus Foundation decided to adopt a new mission: “to end the extraction, export and use of fossil fuels in the United States.” Based “on the belief that an economy and society founded on fossil fuels is unsustainable,” the foundation’s radical approach is strategic as well as principled. “Sometimes you get a good compromise by being the person at the table who says we shouldn’t do this at all.” Farhad is the first to admit that the mission won’t be achieved overnight and that he would be happy with a “just transition” away from fossil fuels. “But there’s also a part of me that wants to have that alternate ask delivered on—stop mining it, stop shipping it, stop burning it. It’s deliberately big and radical in its branding and I think that’s also something that worked well for Occupy.”

**THE MARRIAGE OF  
STORY AND STRATEGY**

Farhad’s social change work is built on narrative—in his words, “a crisp analysis that’s morally grounded.” That’s why the new mission statement doesn’t hedge when it refers to fossil fuels. Farhad believes that story-telling

is equally important when it comes to the actual work of social change. He believes in sharing the stories of those people whose lives are impacted by mining or “fracking.” “We think it’s ultimately very important that the front line community get connected—that their story gets heard by the rest of us—to crystalize that this isn’t just an issue about climate, it’s about climate and health and inequality and democracy.”

**FAMILY INVOLVEMENT**

Farhad believes his parents “raised him with the right values.” Discussion and debate were welcomed at home. “There was really no subject we didn’t talk about.” Farhad says family members “enjoy challenging each other with healthy doses of skepticism,” but that his parents are fundamentally supportive of both his giving and his activism. His sister is a trustee of the Chorus Foundation.

Farhad encourages potential funders to be confident in blazing their own path and to feel comfortable building things—whether they are organizations or relationships. “It’s actually okay,” he says. “It’s pretty safe... Get out there and take some risks and learn from them ... Give it a shot.”

“We need to come to terms with the fact that maybe we aren’t any more worthy than the next person and maybe the sense of entitlement or lack of sense of entitlement doesn’t need to exist and it centers on you doing the best in your situation... It’s a real opportunity to truly do good, and so if your heart feels moved to do good and to work for change—try and use this opportunity. Do it without fear and without feeling ashamed. That’s the best I can do.”

**DAWN**  
**A NEXT GENERATION PHILANTHROPIST WHOSE PARENTS**  
**WON THE LOTTERY WHEN SHE WAS 18 YEARS OLD**

## DO YOU HAVE A PLAN?

If the answer is no, you may actually be in luck.

Starting from scratch allows intuition to play just as important a role as research. If you do have a plan for giving, that’s also great. It means you have something to field test, to run by valued advisors and friends.

As you might have guessed by now, our purpose is not prescriptive. It’s imaginative. We want you to tell the story of your potential philanthropy and paint your own pictures both before you begin and while you act. Perfectionism and philanthropy do not make good bedfellows—don’t wait until you have the perfect training and experience to begin planning. The trick is to turn the switch of possibility from “off” to “on”—and then begin to explore what might exist in this world that you would create.

And keep in mind, there is no single right or wrong answer; some of the best learning is gained through mistakes.

It’s worth remembering that plans are meant to be revised and mistakes often teach us the best lessons. So relax and concentrate. In its first stages, a plan for giving is just a sketch of the philanthropy you might want to build. Thinking ahead and creating a strategy does not mean you must stay on that path. The best plans always include review and revision—tying awareness and responsiveness to an evolving clarity of purpose.

For those of you already engaged with giving programs, you might decide to take some time to consider how your existing strategy might change. As new information comes in, as projects succeed or fail, as your own passions ignite, so too can you adjust your course.

The *Philanthropy Roadmap* can help here, but the essential ingredient is you—your focus, your inspiration, your enthusiasm.

While you work on your plan, here are some ideas to spark how you want to give.

# SOCIAL CHANGE GIVING

## ONE APPROACH

Resource Generation\* is a nonprofit organization that provides information, support and networking to “young people with financial wealth who believe in social change.” Their ideas on giving and tips on how to give as a next generation donor, some of which are shared below, are thought-provoking:

1

### AVOID STRINGS

“If we trust people enough to give them the money in the first place, we need to also trust that they know best how to use it. After all, they’re the ones doing the actual work we’re supporting, so they have the day-to-day experience it takes to know what’s most needed. By giving without strings, we respect the knowledge of those we give to.”

2

### ASK QUESTIONS, START A DIALOGUE

Simple questions to grantees like “What do you need?” or “How can I help?” seem basic, but they’re “not common giving practice. Donors often assume that they already know what’s best and never even open up a dialogue. So it’s worth reminding ourselves from time to time that to be effective givers we also have to be effective communicators.”

3

#### **RECOGNIZE WHAT YOU DON'T KNOW**

Ask for help—especially from those people with experience in the area you want to support. Questions can lead to collaboration. “There are activists out there who have committed their entire lives to trying to make that change happen in their community—who know the histories, the strategies and the priorities inside and out.”

4

#### **WHO BENEFITS FROM THE GIVING?**

A gift to a soup kitchen and a gift to a city’s symphony orchestra will help different groups. Knowing the end recipient can help clarify your strategy. “The bulk of things rich people traditionally give to—like universities, medical research and cultural events benefit rich communities. Even when funding other issue areas, wealthy people usually tend to give to groups that are run and controlled by those with class privilege.”

5

#### **WHAT DOES SUCCESS LOOK LIKE?**

Our idea of success and our grantee’s idea of success might be different. “We need to ask the groups we’re giving to what their visions of success look like. We need to understand how they evaluate their own progress, both short and long-term.”

6

#### **DON'T BE AFRAID OF FAILURE**

“Sometime the most transformative movements and most talented leaders are born out of past failures ... Our success as givers isn’t tied to the success of those we give to. Our own success is about process, about communication, collaboration and challenging ourselves.”

7

#### **CONSIDER DIFFERENT FORMS OF GIVING**

“While there are special rules for charities, there aren’t any restrictions on who individuals can or cannot hand their cash over to. Some nonprofit organizations are certified by the government, which means that giving to them is tax deductible. Other kinds of giving may not save us on taxes, but may still be just as meaningful.”

8

#### **BE OPEN**

Transparency around giving is a good thing in spite of the potential exposure—both publicly and among friends and colleagues. The manner in which next generation philanthropists take action with their resources “can be just as important as the action itself.”

\* Source: Classified—How to Stop Hiding Your Privilege and Use it for Social Change, Karen Pittelman and Resource Generation (2005) Soft Skull Press



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## REDEFINING NEXT GENERATION PHILANTHROPY

JAIMIE MAYER PHINNEY

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**A**t the age of 29, she's a next generation anomaly—a young philanthropist with more than a decade of experience.

Jaimie Mayer Phinney is a trustee and committee chair on the Nathan Cummings Foundation board. She also advises other next gen philanthropists in her job as program director with the peer giving fund Slingshot. As a teenager, she helped found and run an independent spend-down philanthropic fund, the Buddy Fund. When asked to speak at conferences on the subject of next gen philanthropy, Ms. Phinney says she wants to move beyond the concept.

“I'd like to be remembered for getting rid of the term ‘next gen,’” she says, “and really creating an ethos at family foundations of the importance of multi-generational philanthropy, the importance of different generational personalities sitting side by side at the board table and how much stronger and richer the family, the foundation and the work being done in the world will be.”

Her emphasis on multi-generational philanthropy is so strong that when asked recently to tell her own story in philanthropy, she began by quoting the morals taught by her ancestors.

“I was raised with the idea that ‘with privilege comes responsibility’ [her grandma's favorite saying] and ‘nothing will ever be accomplished if all objections must first be overcome’ [the credo of Nathan Cummings, her great-grandfather and founder of the Sara Lee Corporation].”

Family heritage provided more than roots for Ms. Phinney, though. It gave her philanthropic wings.

She was in college when the trustees of the Nathan Cummings Foundation offered the proceeds from the sale of a property (about \$1.5 million) to all the fourth generation members of the family to distribute as they wished. With the help of philanthropic advisors, the “cousins” agreed on the issue areas they would address—arts, women and gender issues and social justice. They also found unity within the framework of the Buddy Fund, which would take risks and give in areas that the big family foundation did not.

The Fund offered her generation a “proving ground,” a place for experimentation and learning and the chance to build a sense of unity for the next generation of the family. But she paints no pictures of perfection at her family foundation. In fact, she takes pride that the foundation “celebrates failure,” learning from mistakes and doubling-down where necessary in spite of limited progress. “For most foundations it's about being polished and looking good 24/7,” she says. “You learn so much more by really staying the course and putting all of your eggs behind one strategy that nobody else is doing.” She points to the foundation's early and long-term support of the Affordable Care Act as one example of such committed giving.

Ms. Phinney challenges next gen philanthropists to be clear about the results they seek: “What is the change you actually want to see in the world? And then...given the capital you have—financial, relationship and intellectual—how to leverage all of those to try and achieve that goal?” She recommends developing a theory of change and vision statement. “You know, I started as an actor so everything in my life goes back to that,” she says. “What does your character want? What's your objective? And what are your tactics and strategies to get there?”

Ms. Phinney acknowledges that family dynamics can create obstacles to next generation givers—“in the philanthropic world so much is heated, so much is about who can scream, who can talk loudest.” Yet, she says that philanthropy's potential can outshine its problems. The key is to be clear about your direction, she says, and light on your feet. “Agility ... that's so important in next gen work ... To never lose sight of the goal you have, but to [be able to] shift your thinking and bring others on board to leverage what you're doing.”

“We are walking into organizations that were set up, in many cases, before we were even born. We are rarely given an orientation or the necessary information to be effective participants. When meetings are held across the country or in the middle of the week, it’s hard to skip school or work to be there. Our family funds may have priorities that we don’t agree with. Plus, making decisions as a group of family members certainly isn’t the most efficient way to give. Agreeing on what to fund—or what to have for lunch—can be a challenge.”

ALISON GOLDBERG AND KAREN PITTELMAN  
CREATING CHANGE THROUGH FAMILY PHILANTHROPY:  
THE NEXT GENERATION

## ARE YOU CONNECTED?

Few of us would dream of living a life disconnected from the Internet. But many live in emotional isolation from family, community and heritage.

Some people look to philanthropy to provide the glue for a dysfunctional family. But without communication, effort and outreach by family members, even the most carefully laid out giving program may not make the center hold. The family philanthropy can sometimes become a place for airing old resentments and, without thoughtful guidance, it can split open existing fissure points in the family.

One family shared their initial feedback on their joint philanthropic experience as “wonderful.” The parents and siblings entered the process hoping it would be a place of common interest and a vehicle for creating a shared legacy for future generations. The foundation had no formal leadership, no guidelines or advisors, and a family-only board.

Sadly, this lack of structure ultimately led to bickering as the siblings began to fight over which issues and organizations to support. Old hurts rooted many years back embodied themselves in fights over what were, in reality, small differences that could have been reconciled. After months of fighting, the daughter announced that the family office would be split because her two brothers had stopped speaking with her father and her due to disagreement over the philanthropy. The end of communication sealed the fate of more than the joint philanthropy. Without the means to discuss grievances and differences in opinion, the two family factions never got the

chance to get past the misunderstanding and, from that point on, the philanthropy reflected the family's rupture instead of their shared experience and history.

Obviously, communication is central when it comes to family wealth and philanthropy. But many people who include themselves in the next generation take a passive role and wait for the older generations to reach out and set up opportunities to talk.

Our challenge to you: Get proactive when it comes to forging a connection to generations that have come before.

You may see your parents or grandparents as staid and unwilling to move out of their circles of comfort. You may come from a family with five or more generations of giving tradition. You may be the youngest in your family. Nothing is an excuse for inaction. Here's why: When you respectfully communicate that you want to be connected no matter the outcome of philanthropic or wealth decisions, you honor the human connection. Once the human connection is sustained, it can be nurtured. You can say clearly—and respectfully—what you want from the relationship and ask what they want. You can seek mutual understanding as a first step.

Author and Harvard philanthropic expert Charles Collier put it this way: “think about values first, product second.” It may require some diplomatic skills, but you may even want to take the lead in this area, initiating a discussion about how individual differences can be recognized and family connection still maintained.

Success in family philanthropy is not measured only by compliance with the law or a mission statement, or even good impact metrics, writes Kelin Gersick in *Generations of Giving*. Success “must also be measured by the family members’ commitment to the foundation’s work, the satisfaction they take in doing that work together, and the foundation’s ability to evolve

and remain vital from one generation to the next. In this sense, a foundation’s success will be measured in the eye of every family member.”

Your parents and grandparents may seek to involve you in the family’s philanthropy. They may offer you a role in deciding which grants the family foundation should give. They may earmark charitable funds for you to grant solely according to your own priorities. Though such offers often come with expectations, they are also an opportunity to connect and exchange ideas.

Is this area filled with fear and loathing for some next generation givers? Definitely. Do mixed families pose special challenges sometimes? Sure. Can it be annoying for one sibling to have to deal with another who controls the family philanthropy? Of course.

Should you give up in light of these challenges? We don’t think so.

Try this: Imagine yourself in your mother’s shoes, or your granddad’s, or your step-brother’s. How do they see the family? What are their values, their fears, their insecurities? What do they see as their role? What legacy are they trying to build?

Everyone is worthy of compassion. And compassion can be contagious when openly espoused. Understanding, connection and communication can follow—all of which keep open the potential for change. All relationships depend on compassion. And family philanthropy is all about relationships.

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## THE ART OF LISTENING

KATHERINE LORENZ

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“I would go in with something to teach and come out realizing I had more to learn.”

For six years starting in 2003, Katherine Lorenz ran Punte a la Salud Comunitaria, a nonprofit she co-founded in Oaxaca, Mexico. Punte seeks to improve rural nutrition by reintroducing the cultivation and consumption of the ancient grain amaranth. But while Ms. Lorenz worked to improve the diets of the people of Oaxaca, she was also learning a deep personal lesson—the best strategy for success begins with listening.

Now, in her mid 30s, Ms. Lorenz is president of the Cynthia and George Mitchell Foundation. Her grandfather, George P. Mitchell, was a billionaire credited both with pioneering the extraction of shale gas (fracking) and launching a philanthropic effort in Texas to enhance energy sustainability through better regulation.

Straddling both sides of the shale gas controversy gives Ms. Lorenz ample opportunity to use her listen-first strategy. That diplomatic approach

also comes in handy as she leads a family foundation where there are 10 children and 23 grandchildren and everyone over the age of 25 is invited to participate. Ms. Lorenz says she spent her first year as president (she started in 2011) just listening to family members and doing research. She had three main goals: 1) maximize the foundation’s impact in the world, 2) be the authentic legacy of her grandparents, and 3) “have the most positive impact internally with the family.”

All three goals depended on her ability to build engagement—and enjoyment—among family members, especially those of different generations. “How do we do this together and have fun?” she says of her challenge. “Family philanthropy can be an amazing experience but it can also be a place where family drama and discord plays out over the board room table . . . Part of [our preparation] was . . . making sure that everyone is involved in the decision-making, that there’s a place for everyone to voice their opinion and passions.”

Engagement also brought flexibility. Ms. Lorenz says the family has reached initial agreement on a proposal that would see the devolution of funding decisions. In the future, two-thirds of grants “would be focused on the issues my grandparents cared most about and one third on what each family member cares about . . . One of the key things for my grandmother, who’s no longer alive, was the family element, having this be something that brought the family together. So my hope is that the discretionary funding is also a part of that legacy.”

In 2012, Ms. Lorenz embarked on another project with massive potential, connecting with five or six of the most powerful next generation philanthropists on the planet. All of them were members of the Giving Pledge initiated by Bill and Melinda Gates and Warren Buffet. (Ms. Lorenz’s grandfather was also a member.) Her mission: to see what they thought about creating a high-level network for next gen philanthropists. Working with the support of the Bill and Melinda Gates Foundation, she says she would like to see the project become a learning network, with peer support and educational resources to enhance impact. “But,” she adds, “as with my family, I think it’s important that any group have buy-in and so I

think the first step is getting the key people who are interested . . . to start talking about what it is that we want and how we can shape it.”

"The meaning you give  
to your financial wealth  
is a statement of  
who you are."

CHARLES W. COLLIER  
WEALTH IN FAMILIES

## WHAT'S YOUR PHILANTHROPIC CALLING?

Taking the time to learn what feels authentic, fulfilling and meaningful in philanthropy can transform your giving.

You don't have to be a zealot. You don't even have to have a public profile. A calling just means you have a direction. It means you know what you care about, what your values are and what you want to accomplish. Once you have this knowledge, making decisions becomes much less about your own searching and much more about the merits of each potential project.

As Charles Collier puts it in his book *Wealth in Families*, it's a good idea to figure out the why of giving before the how—defining what's important before deciding what kind of philanthropy you will actually do.

Patience can be very useful here. Not all of us can access our philanthropic passions easily. Cynicism and self-doubt sometimes create major roadblocks. Often, we can feel frustrated because, though we know many things are not our calling, we cannot put a finger on what feels just right. In such a situation, it's useful to remember that not knowing our calling is often the perfect starting place for a journey of discovery. As Socrates found, questions are often more useful than answers.

Here are a few to get you started:

1

WHAT EXCITES YOU?

2

WHAT KIND OF PROJECT BEST MATCHES YOUR OWN DREAMS,  
SKILLS AND SENSE OF SERVICE?

3

IF YOU WERE TO LIVE YOUR WHOLE LIFE AND NOT ATTEMPT ONE THING,  
WHAT WOULD LEAVE THE BIGGEST HOLE OF REGRET?

Our guide, *The Giving Commitment: Knowing Your Motivation*, (online here: [roadmap.rockpa.org/the-giving-commitment-knowing-your-motivation/](http://roadmap.rockpa.org/the-giving-commitment-knowing-your-motivation/)) may be of value as you delve into what really inspires your approach.

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## BALANCING ACT

KIMBERLY LEILANI MYERS HEWLETT

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For Kimberly Myers Hewlett, philanthropy is all about balance. She honors family legacies (on the boards of two family foundations) yet manages to exercise considerable independence to support causes that she personally cares about (e.g. ocean conservation). Ms. Myers Hewlett has had to do a fair amount of learning, adapting and just plain juggling to find and maintain her philanthropic approach. And though she speaks softly, she is ambitious.

The Stanford graduate undertook a two-year MBA program at Indiana University while caring for two children under five years old. That's in addition to her board work and her role as a steering committee member for the Black Women Donor's Action Group, housed at the Women's Funding Network.

"At first I thought I could manage it all with just a calendar," she says. "A block of time for studying, for reviewing board documents . . . and then I realized that little kids don't stay in boxes . . . And so it's been a balancing act. Sometimes sleep is sacrificed . . . But I have these two kids that I really love

and I want my life to involve all these things, so I make time for them all."

Ms. Myers Hewlett remembers her two physician parents "always giving, always helping people" as she grew up. So her own desire to "do good" developed naturally and early. When she married Billy Hewlett, grandson of one of the founders of tech giant Hewlett-Packard, she found herself in line to join the Flora Family Foundation. This foundation was created so William and Flora Hewlett's children and grandchildren—and their spouses—could participate in grantmaking.

She attended her first foundation event in the spring of 2004, got married that July and joined the Flora board by autumn of that same year. She was 26 years old. The very next year she worked with her parents and her brother to lay the groundwork for the Myers Family Foundation.

With both family foundations, she feels she has "enormous flexibility" on the types of organizations she can support. About the Myers Family Foundation, where she holds the

board office of Treasurer, she says: “I really got to help shape what it looks like. So I don’t feel like there are established rules that I have to follow.”

That flexibility proved important when her parents divorced in 2011 and her father remarried. Facing the prospect that the family foundation might break apart, she and her brother took leadership roles. “You have to deal with reality. My mom was very gracious in saying that she wanted the family foundation to keep going ... so she actually stepped down.”

The way forward then centered on getting everyone else together with a white board and “making space so everyone could talk.” The family has agreed on broad goals: “keep doing good and give everyone in the family an equal vote.”

For next generation givers, serving on a board can be “a great opportunity to discover where you really fit in your family philanthropy and an alternative way to be a leader in your community,” she says. But she emphasizes that new givers should make sure “they know where to go to get help” in terms of mentorship on how boards function and how to advise on grants. She’s adamant that potential next gen board members should not proceed unless they feel “confident in the idea that your voice is actually going to be heard and paid attention to on the board.”

“Philanthropy is, literally translated,  
‘The love of mankind.’

It is about taking enjoyment from  
doing things that help people.  
You have to choose the things you do  
strategically and you have to choose  
things that you will do well...

If you choose to do philanthropy  
in a way that you don’t enjoy,  
I would bet that you’ll do it badly...  
It should be the best possible  
investment of your time.”

**KARL MUTH**  
**ECONOMIST, AUTHOR, LEGAL SCHOLAR**  
**AND NEXT GEN PHILANTHROPIST**

# MOVING FORWARD

People give to people. So goes the old fundraising saying. It's true, of course. But for the purposes of this guide, we'd like to alter it slightly to the following:

## **PEOPLE GIVE WITH PEOPLE.**

This is one of the most exciting trends among next generation philanthropists. Many of them are committed to the idea of active networking—where their personal involvement in their giving leads to a conscious effort to build new connections with other philanthropists, nonprofit leaders, entrepreneurs, activists, scholars and of course, the lives and regions directly impacted by their philanthropy.

For these philanthropists, the connections provide important feedback loops to gather information on impact and new approaches. They also feed the emotional and spiritual sides of giving—for without human contact, philanthropy is like watching a sunset with your eyes closed.

Soon you will be putting down this guide. As you consider your next steps, we encourage you to start with some informal networking of your own.

## **OUR CHALLENGE**

Reach out to another person of wealth who you know shares an interest in philanthropy. Ask them about their experience. If you can't think of someone you want to connect with, consider attending a conference run by organizations that support next generation philanthropy. (See the Resources page.)

The journey of giving is an opportunity to connect—not just with family, but with anyone who can stretch your imagination, expand your ability to make a difference and most importantly, feed your own sense of possibility.



# RESOURCES

"Capacity for Care: Today, Yesterday, and Tomorrow," John J. Havens & Paul G. Schervish, Center on Wealth and Philanthropy, Boston College, January 24, 2011.  
[www.bc.edu/content/dam/files/research\\_sites/cwp/pdf/capacity\\_for\\_care.pdf](http://www.bc.edu/content/dam/files/research_sites/cwp/pdf/capacity_for_care.pdf)

*Classified—How to Stop Hiding Your Privilege and Use it for Social Change*,  
Karen Pittelman & Resource Generation, Soft Skull Press (2005).

Council on Foundations Next Generation Task Force  
[www.cof.org/templates/41.cfm?ItemNumber=16682&navItemNumber=14829](http://www.cof.org/templates/41.cfm?ItemNumber=16682&navItemNumber=14829)

*Creating Change Through Family Philanthropy—the Next Generation*,  
Alison Goldberg, Karen Pittelman & Resource Generation, Soft Skull Press (2006).

Emerging Practitioners in Philanthropy  
Mission: support and strengthen next generation of grantmakers  
[www.epip.org](http://www.epip.org)

"Inheritance and Wealth Transfer to Baby Boomers," commissioned by MetLife from Boston College's Center for Retirement Research, December 2010.  
[www.metlife.com/assets/cao/mmi/publications/studies/2010/mmi-inheritance-wealth-transfer-baby-boomers.pdf](http://www.metlife.com/assets/cao/mmi/publications/studies/2010/mmi-inheritance-wealth-transfer-baby-boomers.pdf)

*Generations of Giving—Leadership and Continuity in Family Foundations*,  
Kelin E. Gersick with Deanne Stone, Katherine Grady, Michele Desjardins and Howard Muson, Lexington Books and the National Center for Family Philanthropy (2004).

Resource Generation  
[www.resourcegeneration.org](http://www.resourcegeneration.org)

Wealth in Families, Second Edition, Charles W. Collier, Harvard University (2006).

21/64 website (nonprofit consultancy for next generation philanthropy)  
[www.2164.net](http://www.2164.net)

## ROCKEFELLER PHILANTHROPY ADVISORS

is a nonprofit organization that currently advises on and manages more than \$200 million in annual giving. Headquartered in New York City, with offices in Chicago, Los Angeles and San Francisco, it traces its antecedents to John D. Rockefeller Sr., who in 1891 began to professionally manage his philanthropy "as if it were a business." With thoughtful and effective philanthropy as its one and only mission, Rockefeller Philanthropy Advisors has grown into one of the world's largest philanthropic service organizations, having overseen more than \$3 billion to date in grantmaking across the globe.

Rockefeller Philanthropy Advisors provides research and counsel on charitable giving, develops philanthropic programs and offers complete program, administrative and management services for foundations and trusts. It also operates a Charitable Giving Fund, through which clients can make gifts outside the United States, participate in funding consortia and operate nonprofit initiatives.

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