

Your Guide to Family Philanthropy

**Bring your family together to
identify and shape your legacy.**

Let this guide inspire and assist you in your
planning process.



You have dedicated an important part of yourself to helping others perhaps through donations, volunteering, or simply kind words.

You want what you've done to matter. Not just today, but for years to come. You hope it means something not only to your community, but to your family too. It's deeply fulfilling to imagine future generations following your example because they saw you live it. But Calgary Foundation understands that inspiring the next generation often takes more than hope. It takes intention.

That's why many families choose to work with us, either instead of or alongside a private foundation. Our deep-rooted community connections and simplified administration let families focus on what really matters: supporting the causes that inspire them.

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Shared Values:

Identifying shared values within your family is a key step in defining your collective principles and understanding how those values can guide your charitable giving.

Share two or three formative experiences in your life. **How did they shape your core values?**

Identify two or three people (they could be family members, other people you know or historic figures) who have been strong influences on you. **What values did they transmit to you?**

What values did your parents pass on to you?
What do you think are the values common to your family?

Inspiration:

The questions below can help to generate discussion about the impact you would like your philanthropy to make in the community.

What strengths do you see in your community that you think should receive further support?

What challenges in your community do you think need attention?

What impact do you hope your family can make through charitable giving and/or volunteering?

Focus:

Do you wish to have a particular focus for your giving? You may wish to have a broad focus.

Examples are:

- Basic necessities
- Lifelong learning
- Wellness
- Environment
- Arts
- Building capacity
- Thriving populations
- Community connections

You may wish to have a more specific focus.

Examples are:

- Poverty
- Mental health
- Aging population
- Neighborhoods
- Indigenous peoples
- Post-secondary learning

You may wish to have an even more specific focus.

Examples are:

- To support the conservation of Alberta's watersheds
- To support scholarships for masters or doctoral students pursuing veterinary studies
- To support low income Calgarians with a hand-up

Whether or not you have a focus depends on your philosophy towards giving and what you wish to achieve. Some families wish to spread their giving as widely as possible to touch as many needs as possible. Other families like to give to all causes that ask and never want to say "no." Others want to make a bigger impact in a smaller arena of needs. And some feel they can have the most impact by putting all of their support behind one cause, a cause they feel most deeply about.

Sometimes a family selects an area of focus in advance of any granting. And sometimes, after years of granting, a family notices a pattern in its giving and discovers in retrospect that it has a focus, which it then formalizes. The focus can change. Moreover, it can help the family take action when choices can be overwhelming.

Communication:

Effective communication is a key factor in fostering family engagement opportunities and building your philanthropic legacy.

Things to consider:

- How often does the family wish to meet to discuss giving motivations and granting decisions? You may opt for an informal meeting at the annual family dinner, or a more structured meeting approach.
- How will you keep records of family discussions and decisions?
- How will you share your philanthropic values, inspiration, and activities with younger members of your family?
- Who will be the main contact with Calgary Foundation, lead discussions on behalf of the family, and make grant recommendations?

Your thoughts on meeting format and frequency:

Your thoughts on the timing of grant decisions:

Your thoughts on record-keeping and sharing information?

Your main contact with Calgary Foundation:

We hope that you found this guide helpful. **Individual worksheets are available to deepen and complement your strategic giving plan and process.** We wish you well as you and your family create a meaningful legacy!

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