CREATING A LEGACY OF GIVING

Your Family Philanthropy Resource

Presented by



United Way
Calgary and Area



Discussing philanthropy with loved ones can be a very fulfilling activity, creating unique opportunities to bond, collaborate, and spend time together.

When family members* share heartfelt goals, relationships have the opportunity to flourish even more.

Thank you for engaging United Way of Calgary and Area to support you and your family's philanthropic journey to create the most powerful legacy.

*The word "family" means different things to different people. As used in this workbook, the term "family" refers to those who sit at your giving table.

Have you considered creating a giving plan just as you would create a financial plan with your professional advisor?

Working together as a family to identify your personal philanthropic passions is a crucial first step to guide and maximize your impact and achieve your charitable vision now and in the future.

There are many different reasons family members choose to work together in philanthropy. This guide is meant to get the conversation started and help make philanthropic choices about family involvement, decision making, and strategy easier.

GUIDE PRINCIPLES:

Be honest with your responses

Be open to new ideas and opinions

Withhold judgment

Seek alignment, not agreement

THIS WORKBOOK CONTAINS FIVE SECTIONS:

1. What inspires you? pages 7-12



2. What inspires your family? pages 13-16



3. What is your giving focus? pages 17-22



4. How will you make decisions? pages 23-26



5. How will you celebrate? pages 27-28

United Way applies our comprehensive and collaborative approach in supporting families to define their philanthropic mission and vision, learn more about issues they care about, and develop giving plans that will achieve the greatest impact.

ONE WORKBOOK FOR EACH FAMILY MEMBER PARTICIPATING IN THE PROCESS

As you navigate this guide, we hope you feel connected and inspired through your giving plans.





Section 1

WHAT INSPIRES YOU?

People give for many different reasons and understanding your own motivations will help drive family conversations. Each member participating should complete section one on their own. Find a quiet spot to reflect on your personal passions and philanthropic values, and then come together as a family to each share a few key insights.

Rank each on a scale of 1-5 with 1 being not very important and 5 being very important.

___ To share your good fortune by giving back to society
___ To help those who have less and meet critical needs in society
___ Personal identification with an issue, cause, population, or organization
___ Religious and/or ethical beliefs
___ To improve quality of life in our community
___ To set an example for peers and others
___ Social reciprocity—asked by friends and colleagues
___ To leave a legacy
___ It's enjoyable and fun
___ Other

Notes:

Consider your personal values and reflect on how they have been shaped by your life experiences. List a few examples below.

Who has impacted your life and affected the person you are today? Did they share the same ethics and values?

Do these values speak to the kind of philanthropy you want to model? How?

What issues do you care passionately about? Why?

How do the issues you care about reflect your values, ideals, and convictions?

Imagine that you had the opportunity to solve one issue, big or small. What would it be, and why?

REMINDER:

Before starting section two, take time for each family member to share any key insights and learnings from your personal reflection.

Here are a few questions to guide the conversation:
What stood out the most for you? Did anything surprise you?

Share one of your answers that means a lot to you. It is important to let each member take a turn and acknowledge everyone's learnings or insights.

All of the remaining sections can be discussed as a family. However, it may be more impactful to reflect on the sections individually first to create more meaningful discussions. Determine beforehand how your family wants to proceed.





Section 2

WHAT INSPIRES YOUR FAMILY?

Now that you have taken the time to identify your personal philanthropic passions and reasons for engaging in family philanthropy, let's look at identifying common family values and the benefits of working together.

Remember that you can refer to each member's answers in section one when discussing this section.

Rank each on a scale of 1-5 with 1 being not very important and 5 being very important.

___ Bring family closer together
___ Learn more about other family members and their interests
___ Begin to establish or continue a family philanthropic legacy
___ Expose other family members to different needs in the community
___ Find a common ground for working together
___ Have fun together
___ Recognize and celebrate the family history and values
___ Other

Notes:



What values do you feel you share, or have in common, with your family?

What values do you feel you differ on, or are opposite of, with your family?



Is there a family story that has been passed down through the years? What does this story say about your family's values?

Has any event, individual, or organization moved or touched the family in a significant way?

Section 3

WHAT IS YOUR GIVING FOCUS?



What impact would you like your family's philanthropy to make in the community? Do you wish to have a specific focus for your giving? Or do you wish to have a broader focus for your giving? The following section will help you discover the answers to these questions.

What are some of the issues in your community that you feel are already being positively impacted? Do you think more needs to be done?

Where do you see opportunity for improvement when looking at issues in your community?



How do you envision making change in the community through your family giving decisions?

Imagine a healthy, vibrant Calgary in the year 2050. What needs to happen to make your vision a reality?



Circle which of the following impact levels interest you most: **Local** **National** **Global**

Which guiding principles would you choose for your family's giving?
Mark an "X" on each one that resonates with you.

___ Ambitious
___ Bridging
___ Challenging
___ Champion
___ Collaborative
___ Entrepreneurial
___ Flexible
___ Hands-on
___ Inclusive
___ Innovative
___ Leadership
___ Leveraged
___ Nimble
___ Partnering
___ Proactive
___ Proven
___ Responsive
___ Risk Tolerant
___ Supporting Success
___ Targeted for Impact
___ Visible
___ Other

Notes:



What areas resonate the most? Rate them with 1 being not very interested to 5 being very interested. Expand on any issues that you are very interested in in the notes sections below.

___ Addiction
___ Adult Learning
___ Aging Populations
___ Animals
___ Arts
___ Basic Needs
___ Children & Families
___ Community Development
___ Domestic Violence
___ Early Childhood Development
___ Education
___ Employment & Training
___ Environment
___ Faith
___ Food Security
___ LGBTQ Rights
___ Health Specific Disease
___ Health Care
___ Housing
___ Immigrant Newcomers' Inclusion
___ Indigenous Rights
___ Innovation
___ Literacy
___ Mental Health
___ Persons With Disabilities
___ Post-Secondary Learning
___ Poverty
___ Safety
___ Science & Technology
___ Social Isolation
___ Recreation
___ Violence Prevention
___ Wellness
___ Women's Rights
___ Youth
___ Other

Notes:



Now you can begin thinking about how you want to impact your chosen issue area. Similar to a financial investment mix, consider what your philanthropic mix looks like (ie. 50% prevention, 25% emerging, 25% innovation – or some other combination). What areas resonate most:

___ Prevention: A pre-emptive approach; preventing issues from developing
___ Early Intervention: Addressing issues before they spiral into larger problems
___ Collaborative Work: Working together, combining resources and ideas to achieve a common goal
___ Innovation: Looking at old problems in new ways
___ Pilots and Prototyping: Testing potential new solutions to issues
___ Capital: concerted effort to make a substantial impact for a specific project or undertaking
___ Programmatic: Programs that offer services and supports to address an issue
___ Systems Change: Addressing the underlying causes of issues by altering the structures and supporting mechanisms which make a system operate in a particular way
___ Emerging Needs: Issues that are becoming more apparent and must be addressed

How would this investment strategy provide you with the kind of impact you want to have?





Section 4

HOW WILL YOU MAKE DECISIONS?

Planning your family's philanthropic giving should be an inclusive and enjoyable experience. It's important to identify roles up front, so that your family is aware of the decision-making process and can focus on maximizing collective impact.

What are your preliminary thoughts about decision making? How much will each family member's voice count? Mark an "X" on each one that resonates with you.

___ A democracy - one person – one vote
___ Decision making will be delegated to certain family members
___ We would like it to be a democracy, but recognize that others may defer to a specific person
___ Parents vote counts more than others
___ Everyone included but parents have the votes
___ We will make decision through consensus
___ Other

Expand on which decision-making model resonates most and why:

Note: You can change your decision-making model over time as all members of the family gain more experience in giving.



When a family is able to determine the various factors of philanthropic communication it will lead to greater understanding and success for years to come.

Family Members: Who are considered family members? Do all family members play the same role? Who will be a part of family discussions? Who will you share information and decisions with? Consider these different aspects for immediate family, extended family, spouses, and younger generations.

Frequency: What commitment does the family wish to make around the frequency of giving discussions?



Structure: Do you want to meet informally during a family meal, or a more structured meeting approach with a professional or philanthropic advisor?

Facilitation: How does your family want to work with United Way going forward? Is the entire family in communication or is there a point person? Is this the same every year or does it rotate?

Record Keeping: Discuss how you want to track your charitable decisions and conversations. How will the family record and share this information between family members?





Section 5

HOW WILL YOU CELEBRATE?

As a family it is important to determine how you want to collectively celebrate your giving achievements. How often do you want to celebrate as a family? Is your celebration formal or informal?

Take the time to also discuss if you would like your recognition to be public or remain private (anonymous). Public recognition can inspire others and allows you to share your commitments and passions with the larger community. However, you may also prefer to remain anonymous to avoid drawing attention and also to avoid receiving unsolicited gift requests.

Our family's thoughts on recognition:

Is there anything else your family discussed that you would like to capture? You can always return to add more thoughts.



UNITED WAY RESOURCES

Did you know you can partner with United Way to support all your philanthropic endeavors beyond social issues? United Way is committed to providing you with resources to help you make giving as fulfilling as possible. Check out some of our resources and tools available to you and your family.

Family Facilitation: A more fulsome, customized, and guided approach with one of our philanthropic experts to maximize your family's impact and achieve your charitable vision.

Family Funds: An opportunity to consolidate your giving and create a fund with United Way to suit your individual needs. Family Funds are a flexible option to include family members in your family legacy.

Tomorrow Fund: The Tomorrow Fund is United Way's legacy fund—gifts are invested for the long term, and the interest earned pays dividends in the form of community investments in local programs. It's the gift that keeps on giving.

Estate Planning Seminars: Expert advice from legal, tax, and insurance professionals around the benefits of proper planning, and how to maximize and multiply your impact in the community.

Will Planning Guide: By using today to plan for tomorrow, you can retain more of your assets, protect your estate, and leave a legacy for yourself and your loved ones. This guide assists you in considering and collecting information, which you and your lawyer may need in preparing or updating your will.

Transformational Opportunities: Looking to make a significant impact in your community? Work with one of our philanthropic experts one-on-one to co-create a solution to tackle a pressing social issue.

CONTACT INFORMATION

To access any of the above resources or for additional support please contact:
Planned Giving Officer
P: 403.231.6444 | E: planned.giving@calgaryunitedway.org

We hope this resource has been beneficial to your family philanthropy conversations. Thank you for envisioning a better Calgary for all.



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