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Stewarding Privilege: Transitioning to Millennial Leadership in Christian Family Foundations

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STEWARDING PRIVILEGE:
TRANSITIONING TO MILLENNIAL LEADERSHIP
IN CHRISTIAN FAMILY FOUNDATIONS

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CERTIFICATE OF APPROVAL

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DEDICATION

For Daniel and Nate, inheritors of a legacy for next generation generosity.

ACKNOWLEDGMENTS

This research has been inspired by almost twenty years in executive leadership in family philanthropy, beginning first with Cambridge, Ontario-based Bridgeway Foundation, founded by my parents, Reg and Carol Petersen. The way they selflessly opened space for my leadership speaks to their generosity and vision for ongoing impact by our family's philanthropy. More recently, my work with clients of Stronger Philanthropy has permitted me to better understand the complexities experienced by other families of wealth besides our own. Being invited into intimate decision-making around generosity with others is holy ground, and a rare privilege. I am also grateful to eleven anonymous participants whom I interviewed for this dissertation, and who graciously provided a window into the challenges and blessings of philanthropic giving.

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I am so grateful for my family's support by my wife, Karen, who relentlessly cheered me on, and by my sons, Daniel and Nate, for whom this research is especially relevant. Finally, I thank God, whose faithful presence and love inspires me to serve him from the place I have been planted.

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ABSTRACT

While Christian family philanthropy has significant potential to influence the viability and success of Christian ministry, it is an understudied area of investigation. In surveying its context, both formal and informal structures provide the framework for stewarding this privilege. These are under pressure to change due to generational shifts, family dynamics, evolving expressions of faith, and shifts in philanthropy itself. These pressures create specific challenges for the leadership of foundations by descendants of the Christian founders as they grapple with donor intent, ongoing stewardship, daily operations, and public accountability by their foundations.

Succession is a common transition for organizational life that is also experienced within Christian family foundations. Though studies on family philanthropy succession are few, research pertinent to family business succession can be applied to the topic. As new generations inherit the responsibility of continuing the founders' legacy, common failures in the succession process reveal roadblocks for smooth transitions.

One must create the conditions for a smooth transition to next generation leadership in Christian family philanthropy. Following the self-emptying surrender of Christ, founders must be prepared to take a leap of faith and release control. Descendants must learn confidence and self-differentiation strategies that permit them to acquire their own vision for stewarding family philanthropy. For each person, trust in God's guidance is required.

To facilitate a successful transition for next generation leaders, an experiential nine-month philanthropy incubator has been designed. This artifact assists next generation philanthropists to learn together with their peers through giving and

volunteering with charitable projects. By learning as a community of practice through participation in small projects together with non-profit practitioners, they gain confidence, knowledge, perspective, and vital tools for future leadership in generosity. The program will serve eight givers and eight non-profit leaders in the first year. The artifact will define recruitment strategies, project selection criteria, budget, program content, methodology, retreat specifications, personnel needs (mentors, retreat facilitators), workflow, timetable, and evaluation processes.

The dissertation has narrowly focused on stewarding the privilege of next generation Christian family philanthropy. Additional areas for further investigation are suggested, along with a consideration of the drivers behind the current research.

SECTION 1:

PRIVILEGE SQUANDERED

Introduction

The stewardship of significant wealth by inheritors in Christian families introduces pastoral and theological considerations that are not typically attended to within most churches. Most would not likely consider that giving large amounts of money when motivated by faith to be an onerous task. But Christians that have a ministry of giving through family foundations quickly discover there are unforeseen challenges and myriad snares in philanthropy that are not normally anticipated. I describe these, and how to overcome them, in my earlier book, *Love Giving Well: The Pilgrimage of Philanthropy*.[1] While wealth creators struggle with their responsibility, they must also contend with the challenges of succession. As founders age, and new generations assume leadership, will the original legacy of the founders continue? When philanthropy is constructed with a Christian charitable purpose, how can one trust that the capital will continue to empower Christian ministry in the future? Will endowments that were formed for Christian ministry objectives end up being squandered or redirected by successive generations of the family?

There are inherent pressures facing Christian family philanthropy in the 21st century that will be addressed in this dissertation. These are evident to me both as a second-generation inheritor from a family of wealth, and in my professional philanthropy

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[1] Mark Petersen, *Love Giving Well: The Pilgrimage of Philanthropy* (Eugene, OR: Wipf and Stock, 2017).

career over the past nineteen years. I have drawn on research both through a selection of pertinent readings as well as interviews conducted in early 2018 with eleven participants drawn from three groups: wealth creators, inheritors, and fundraisers.

The purpose of this dissertation is to uncover ways in which transitions in leadership in Christian family philanthropy can occur in a healthy way. It is possible for leadership transitions within families to honor the legacy of the founders, to empower next generations to lead with passion and purpose, and to be attentive to the Holy Spirit's ongoing ministry of discerning and guiding one's descendants. My hope is that tending to the thoughtful succession of leadership within families of wealth will enable an ongoing and impactful ministry that continues the legacy of Christian witness with each new generation.

One Family's Dilemma

The dilemma of intergenerational transfer can be best illustrated through story. Consider the following scenario. Ralph McGowan, a visionary Calgary entrepreneur, launched Transcana Resources to supply the burgeoning oil-and-gas industry in the 1970s. Forty years later, he sold the company which was merged into a multinational corporation; the substantial profit of over $50 million was transferred to their private family foundation. With this wealth, Ralph and his wife Melanie, now in their early 70s, created the foundation as a witness to their faith in Christ. Believing that this financial success was a blessing from God, they envisioned a future where their three children, James, Rebecca, and Joey, would carry on their legacy.

The family foundation, as mandated in its founding documents, gives to Christian charities “to advance the kingdom of God;” over fifty churches and parachurch organizations benefited from $3 million dollars in annual donations. The McGowan social calendar is filled with fundraising galas, lunches with fundraisers, and insight trips to the developing world with their parachurch partners. The founders envision giving in perpetuity; the capital is shrewdly invested and only income from interest is donated. Once descendants turn twenty-five, they are invited to serve on the board, and the governance of the foundation is maintained within family. According to the founders, the foundation would be a force for the kingdom of God long into the future.

Christian faith is a guiding benchmark for the family. James, Rebecca, and Joey were raised by their parents in a large, suburban, evangelical church, yet just as evangelicalism has shifted over time, they too have embraced postmodern expressions of faith. Today, eldest son James manages the foundation, yet his arrogant leadership style has turned off his siblings. Joey privately claims to be agnostic after experiencing a painful, messy divorce. Rebecca’s daughter has come out as a lesbian, lives with her partner, and attends an LGBT-affirming church in the city center. Church attendance for several family members is sporadic, though Rebecca and her husband have joined a more conservative, rural church in the Foothills and are critical of family members, including their daughter, who in their minds have “abandoned” their original commitment to Christ. Dysfunctional patterns of behavior, favoritism, control issues, and communication challenges abound as they are now set to inherit the responsibility of managing and disbursing the wealth created by their parents. What was once anticipated as a joyful legacy for Ralph and Melanie in creating the McGowan Family Foundation is now at risk.

This imaginary story contains the challenges inherent in the actual experience of many Christian families of wealth. The sincere aspirations of founders, the constant pressure of being sought after for donations, family dynamics as second and third generations come of age and into the responsibilities of leadership, the evolution of evangelical faith expression, and the legal and operational challenges of family philanthropy are all evident. Without careful stewardship of the transition in leadership within family foundations, the privilege that has been inherited can be wasted.

The Context for Christian Family Philanthropy

The remarkable wealth of Christian entrepreneurs in North America in the early part of the new millennium has created a surprising burden that one might term "First World Problems." As mentioned in the introductory story, many entrepreneurs sell their companies or realize great financial gains during their lifetimes. This is especially true for the Boomer generation who are now retiring, paving the way for the largest transfer of wealth in history.[2] The entrepreneurial risks taken by Boomers in recent decades combined with economic cycles of impressive growth have resulted in vast pools of capital available for philanthropic purposes.

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[2] MacKenzie Sigalos, "$68 Trillion Is about to Change Hands in the US", CNBC, November 20, 2018, https://www.cnbc.com/2018/11/20/great-wealth-transfer-is-passing-from-baby-boomers-to-gen-x-millennials.html.

Giving USA, the most comprehensive annual report on American philanthropy, cites that 18% of all philanthropy transacted in the US in 2018 came from foundations that gave $75.86 billion in that year alone.[3] Religion tops the list of beneficiaries, with 31% of all American giving designated for faith-based organizations.[4] In more secular Canada, religion is fourth-largest category for giving at 21%.[5] Many of these religious givers are inspired by their faith in Christ and choose to structure their affairs to generously give to causes integral to their faith commitment.

These Christian entrepreneurs recognize that as a family, they have more than they need. All personal necessities of life are amply provided for: homes, vacations, education, health care, and retirement. Even when inheritances are considered, dependents are generously covered. In considering this blessing, Christian families move away from selfish accumulation and excessive comfort to a place of surrender and service, recognizing family resources are meant to be stewarded for the broader community. Daniel Bell asserts,

> God's abundant provision should not be confused with a 'prosperity gospel'. God's abundance is not about meeting our wildest consumer dreams…. [R]eceiving the gift of God's abundance is not necessarily about the receiving more (for many it will mean consuming less) but about the reordering of desires such that we can properly recognize (and enjoy) enough and share the abundance we have been and continue to be given.[6]

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[3] *Giving USA: The Annual Report on Philanthropy for the Year 2018 (2019),* Chicago: Giving USA Foundation, 18.

[4] Ibid., 18.

[5] *The Giving Report 2018* (Toronto: CanadaHelps, 2018): 7, accessed May 21, 2019, https://www.canadahelps.org/en/the-giving-report/.

[6] Daniel M. Bell, The Economy of Desire: Christianity and Capitalism in a Postmodern World (Grand Rapids, MI: Baker Academic, 2012), 179-180.

Financial planners and wealth managers assure these high achievers that the best way to steward their finances and avoid high taxable gains is through the creation of a charitable foundation. This legal structure, that manages the family's philanthropy, is a vehicle that avoids taxation on the gain from the sale of the company or on high income streams. But when advised solely by wealth managers and tax experts, these charitable pioneers fail to strategize for the ongoing stewardship of their foundation's charitable assets as an act of Christian worship. Instead, wealth is divided from the reordering of one's desires and it becomes an exercise in philanthropy untouched by deeper faith priorities.

In North American culture, Christian charitable giving is traditionally a solitary act, inspired by one's personal faith, and in response to Jesus' command to pay attention to those with the greatest need for nourishment, belonging, dignity, health, and restoration. In responding to those individuals, one was ministering to Christ Himself. Jesus offers this parable:

> Then the king will say to those at his right hand, 'Come, you that are blessed by my Father, inherit the kingdom prepared for you from the foundation of the world; for I was hungry and you gave me food, I was thirsty and you gave me something to drink, I was a stranger and you welcomed me, I was naked and you gave me clothing, I was sick and you took care of me, I was in prison and you visited me.'[7]

Giving in this way is direct, discreet, and humane; it is one of the hallmarks of fruitful Christian living and is fundamental to following Christ no matter the size of one's wallet. But Christian philanthropy, by nature of its large size, scale and platform, addresses a different reality than the intimate gifts where "your left hand [doesn't] know

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[7] Matthew 25:34-36, NRSV.

what your right hand is doing."[8] The creation of a private foundation as a formal giving instrument propels the family from anonymity into the public realm with requisite public accountability and annual tax filings available to anyone with a browser. As well, the size and scale of grants on offer require more than a spontaneous hand-out mentality – one altruistic act can frequently underwrite a year's salary in the non-profit sector, create fresh programming for innovative missional outreach, or endow the construction of a building for ministry purposes. Significant due diligence on grants made must occur for responsible giving.

Joel J. Orosz, Senior Program Director at the W.J. Kellogg Foundation, insists that foundations have a unique societal role that is distinct from an individual's charitable giving. While individuals give generously to needs as they arise, Orosz states that foundations should primarily concentrate on:

1. Philanthropy (root causes) as opposed to charity (meeting immediate needs);
2. Supporting innovation as opposed to supporting ongoing programming;
3. Leveraging funds as opposed to being the sole funder; and
4. Helping good ideas get a trial and a start as opposed to funding tested and approved approaches.[9]

Orientating family philanthropy toward such ends enables it to become more strategic and a better stewardship of funds entrusted to them by God.

Wealthy Christian founders must contend with another issue. Strategic giving done out of a long-term endowment implicates not just those who create the foundation, but each family member and descendant of the founder. A significant percentage of

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[8] Matthew 6:3, NRSV.

[9] Joel J. Orosz, The Insider's Guide to Grantmaking: How Foundations Find, Fund, and Manage Effective Programs (San Francisco: Jossey-Bass, 2000), 18.

foundations give out of annual interest generated and leave the principal to exist as a never-ending pool of capital. While the trend of giving it all away now, or "sunsetting" one's foundation, is growing, a *Wall Street Journal* report indicates that 90% of foundations still plan to operate beyond the present generation.[10] This implies that generation after generation of a family will have giving responsibilities tied to the decisions of the founders to give in perpetuity.

Perpetual giving through a family foundation in a world that is constantly changing means there needs to be a strategy for continuing relevance and adaptation by the foundation. The composition of the family will naturally modify through births, marriages, divorces, and deaths. Faith expression changes and evolves as well. The needs of the world shift over time. Program areas may shift. Thoughtful evolution, not static constancy, needs to be an essential quality of a foundation's ongoing essence.

Foundations are by their nature conservative creations. While the entrepreneur may have risked much to grow a company, foundations are often overly concerned with preserving wealth and maintaining the status quo; with many, assets are invested conservatively and disbursements are awarded to only the safest blue-chip charities. Likewise, next generations charged with foundation management didn't create the wealth, so they may be risk-averse and err on the side of preserving capital. Additionally, it is a unique struggle to balance operating a public-facing organization when family fill all the leadership roles. With one's own relations, it is often not possible to acquire the right mix of competencies and chemistry to run such organizations. Once operative,

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[10] Shelley Banjo, "Philanthropists Set Spending Deadlines", *Wall Street Journal*, May 21, 2009, https://www.wsj.com/articles/SB124286449013441415.

foundations may resist change due to the hard work that change entails – it is often easier to continue past practices rather than innovatively adjust operations to embrace emerging realities.[11]

Resistant structures are challenged by operating within a changing culture, one in which change is a constant and must be expected. Pressures due to change from both inside the family and from external sources will emerge over the passage of time, particularly if there is a commitment to give in perpetuity. Succession issues, strategic relevance and organizational direction, shifting practices within the philanthropic sector, the impact of new forms of technology, and for Christian families, evolving faith commitments and expressions are all examples of how family philanthropy will be pressured to change. The context for family philanthropy can be analyzed by reviewing the frameworks undergirding it, and in understanding the changes that exert pressure on these existing frameworks.

Frameworks in Family Philanthropy

The creation of a Christian foundation releases the potential for one's legacy to benefit many for ministry purposes, but the frameworks employed can unexpectedly damage families and diminish the intended impact of the endowment. The challenges of the structure and systems in family philanthropy will be the focus of this section with

[11] Diana Leat, "Social Change Grant-Making: A Failure of Innovation?" *Third Sector Review* 15, no. 1 (January 2009): 63-83.

consideration given to donor intent, family dynamics, stewardship issues, operations, and accountability.

The private foundation is a customized giving vehicle, entirely within the control of its board (most usually the immediate family members) that determine what causes should be supported. Yet it must be remembered that foundations exist in society to serve a public, charitable purpose. As a result, the foundation incurs a responsibility to report to government and the public as to the use of funds. While there are no requirements regarding impact that must be achieved, there are obligations relating to the amount of funds disbursed annually – 3.5% of assets in Canada[12], 5% of assets in the US[13] – and to whom[14]. Canadian law requires disbursements be directed to registered Canadian charities[15], while American law provides for somewhat greater latitude to foundation boards in the disbursement of funds. Legal requirements in other countries will have their own distinctions.

The Framework of Donor Intent

The decision to create a foundation occurs during a period of intense analysis of one's wealth and guiding values. For the Christian entrepreneur, spiritual priorities are

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[12] Government of Canada website, "Disbursement Quota Calculation", accessed May 23, 2019, https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/annual-spending-requirement-disbursement-quota/disbursement-quota-calculation.html.

[13] Internal Revenue Service website, "7.27.16 Taxes on Foundation Failure to Distribute Income", accessed May 23, 2019, https://www.irs.gov/irm/part7/irm_07-027-016.

[14] While the generally cited standard is often summarized in this way, the actual calculation of funds to be disbursed by private foundations is a rather more complicated formula. In Canada, for example, the amount to be disbursed is the average of the previous two years' of the foundation's net present value as measured at six-month intervals throughout those two years.

[15] There are a few minor exceptions, such as any entities supported by the Queen and those related to the United Nations.

preeminent, and typically, the creation of a philanthropic entity assumes the resulting foundation will invest into activities that reflect the faith commitment of the founders. For Boomer evangelicals, this would often result in funding the work of parachurch organizations that upholds the values of the founders. Large evangelical parachurch entities such as Focus on the Family, Inter-Varsity, Mercy Corps, World Vision, Compassion International, and faith-based universities and colleges are prime examples of the type of beneficiaries of such committed donors.

The original intent of the founders is often explicitly outlined in the foundation's founding incorporation documents and operating by-laws. Future generations must grapple with how to honor that individual's values and legacy. The case of M.J. Murdock Charitable Trust in Vancouver, Washington provides a strong illustration. The founder, Jack Murdock, was a Christian entrepreneur who met an untimely death in 1971. In his will, he instructed three trustees to establish a charitable trust "to nurture and enrich the educational, cultural, social and spiritual lives of individuals, families and community."[16] Due to his business success in the Pacific Northwest, the trustees settled on a pattern of innovative and capacity building grants that met his criteria in the five state region, leading it to become one of the five largest private foundations in the region.[17] This rigorous focus channels giving toward a specified agenda, while at the same time strategically eliminates the majority of the world's needs from eligibility for the foundation.

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[16] Murdock Trust Website, "History," accessed April 17, 2018, https://murdocktrust.org/our-story/history.

[17] Murdock Trust Website, "History."

Some larger Christian family foundations are less focused. They have established mission statements that guide their philanthropic action as organizations; while advancing the propagation of faith, they typically have broad platforms. Examples of common mission statements by such foundations follow:

- Maclellan Foundation, Chattanooga, Tennessee: "The Maclellan Foundation is called to glorify God by leveraging the legacy, resources, relationships, and experience entrusted to us to serve those advancing Christ's Kingdom around the globe."[18]
- The Stewardship Foundation, Tacoma, Washington: "The Stewardship Foundation provides resources to Christ-centered organizations that share their faith in Jesus in word and deed with others throughout the world."[19]
- The Bolthouse Foundation, Bakersfield, California: "The purpose of The Bolthouse Foundation is to glorify the Lord Jesus Christ by supporting charitable and religious organizations whose ministry, goals, and operating principles are consistent with evangelical Christianity as described in The Bolthouse Foundation Statement of Faith."[20]

The challenges facing future generations are many if family members no longer support the original intent of the founder, or if the founders are already deceased. Corey Finestone is the third-generation inheritor in a prominent American foundation created to support the flourishing of Christian ministry in specific, named locations. He describes how its founding documents ensured all future capital would be directed toward such purposes, and the dilemma that is created if, over time, the priorities and interests of descendants have changed.

> In our bylaws we actually say … if there's not five people in the extended families who are called of Christ and who are desiring to do the foundation, it shuts down... [I]f we get to the point where I'm not capable of doing this because

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[18] Maclellan Foundation website, accessed May 17, 2019, https://maclellan.net/about.

[19] Stewardship Foundation website, accessed May 17, 2019, http://stewardshipfdn.org.

[20] The Bolthouse Foundation website, accessed May 17, 2019, http://www.thebolthousefoundation.org.

> I'm too old and my mind isn't there, how about those others who will be between thirty-five and fifty? So, twenty years from now, if we still are going, right?[21]

In an ideal world, future grantmakers would be provided with written guidance from the founder that would offer winsome guidance, yet with ample room for creativity in giving by inheritors. In other cases, however, donor intent is not explicitly defined in legal documents. In such situations, there is an implicit moral obligation of succeeding generations to honor donor intent in the best way possible. Family members attempting to respect donor intent, yet stuck with an ill-defined or non-existent charitable purpose, is a common problem and navigating these waters is a challenge.

Stewardship Frameworks

The reality of donor intent impacting future foundation giving naturally leads to another problematic area for families with private foundations. Who will manage the foundation in the future once the founders pass away? Mark Daniell and Tom McCullough, authors and wealth managers in Singapore and Toronto, highlight the issue of ownership. They claim:

> [It is] the degree to which individuals choose to spend time, invest effort, and feel a sense of ownership in the management of family wealth. Some experts call this emotional ownership… Finding a way to engage family members, especially the young, can be a major challenge, and one in which younger family members may have little connection or interest and even less understanding…. It is hard for many to imagine that managing substantial family wealth, with all of the benefits and advantages it brings, can be seen to be a burden rather than an opportunity.[22]

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[21] Corey Finestone (pseudonym), interview by author, March 10, 2018, transcript, personal archives.

[22] Mark Haynes Daniell and Tom McCullough, Family Wealth Management: Seven Imperatives for Successful Investing in the New World Order (Singapore: Wiley, 2013), 377.

It is naturally assumed that the founders own and control that which they have created. But with a foundation they have created an entity that will often survive past their lifetimes. How will future descendants engage with this responsibility, which is an inherited obligation? Felix Jones, a thirtysomething inheritor, describes the ambiguity he faced when his parents introduced the idea of their foundation to him:

> So, when they originally started the foundation, they presented it to my siblings and I and said, 'We're doing this thing. We want you involved.' And we all went 'Okay. Sure, whatever. Let us know what that sounds like.' But then we all got engaged [to our spouses] and got married and we weren't even allowed to really talk about the foundation until we were engaged. And eventually the in-laws all became involved. So, it wasn't that we were initially like a board, [or] were requested to join a board. It was just this initial general assumption of 'You're our family, so thou shalt be involved,' right? It was the eleventh commandment nobody thought about…. And maybe it extends to 'Honor thy father and thy mother.' Who knows?[23]

There is an often-unstated expectation that the philanthropic entity, with so much potential, will become a legacy that the parents will pass on to future generations. Yet who is this group, and to what degree will they effectively steward that which they are obligated to administer? This group is not a static set of people. Descendants of the founders comprise children, grandchildren, great-grandchildren, and beyond; further complexity is added with the inclusion of their spouses. Added to this are other unpredictable yet common realities such as death, divorce, mental stability, illness, common-law relationships, children born out of wedlock, family schisms, and more. Due to naturally evolving family dynamics, some will participate, and some will become sidelined. As the foundation evolves, it is also likely that the founders' legacy will eventually take on alternative priorities than that which they originally envisioned. As

[23] Felix Jones (pseudonym), interview by author, March 23, 2018, transcript, personal archives.

both Jones and Finestone infer above, there is an implied duty to steward something not of their own creation. If succession planning, definition of membership, decision-making processes, and responsibilities of leadership are not clearly articulated in a formal way, and if significant work is not done to orientate and train new generations to assume leadership and establish creative control, effective stewardship of the entity will be lacking.[24]

Operational Frameworks

Another structural issue for family foundations relates to the philanthropic operations, the essential day-to-day functioning, by which a foundation fulfills its mission. Assuming operational leadership of a foundation requires the creation of systems to ensure accountability and to facilitate the work of giving and delivering on impact by beneficiaries. Systems include administrative operations, financial management, board governance, creation of strategy, the disbursement of grants, reporting on impact of grants, and relating to the public as stewards of a charitable entity. Additionally, for faith-based families, priority is often given to prayer and discernment to ensure God is leading the family in these issues.

Operating a family foundation should require a strategic plan that strives to meet objectives related to mission fulfillment. Settling on a strategic direction, however, is laden with challenges for most families. Family foundations are encumbered by innate patterns of relationships that are familial in nature, not typically formalized nor structured

[24] Charlotte Lamp, "The Positive Influence of Family Governance on the Family Business System: A Multiple Case Study" (PhD diss., Gonzaga University, 2010), 225.

by organizational norms and best practices. Tom Tierney and Joel Fleishman, leading researchers in American philanthropy, explain:

> [T]he combination of donor, spouse, and adult children (including, perhaps, their spouses) creates a group often better suited for holiday gatherings than serious decision making… [Y]ou can have quite a volatile concoction, with people importing family dynamics that may have evolved over decades, personal passions, and (often strident) points of view into every board meeting. Moreover, unlike privately held family businesses, philanthropic boards have no performance metrics or profit motive to defuse these dynamics and help their members align around common goals. If anything, the deeply personal nature of philanthropy can drive the dynamics in exactly the opposite direction. And in foundations established in perpetuity, where the board must have the ability to sustain and renew itself across generations, this tumult is often intensified.[25]

The potential for dysfunctional relationships to marginalize effective foundation giving in this scenario is legion. How one navigates these minefields to ensure healthy operational life for a foundation is critical.

There is a tension here between art and science, heart and head. One must lean into professional standards of operation, and yet its members are also a family; philanthropy can be an intimate and meaningful way to bring family together. Private family philanthropy can lead with strategy and purpose yet listen to God's leading and to each other. Peter Frumkin, philanthropy researcher from the University of Texas at Austin, offers this advice:

> Philanthropy cannot be reduced to a narrow set of technocratic directives or even to a single set of prescriptive claims. In its natural form, philanthropy is full of art and personality, bursting with idiosyncratic visions, unsupported claims, and deeply held passions. The great mistake that many donors have made is to aspire to turning their giving into something purely efficient, precise, and consistent. The impulse to strive for a more scientific approach has been aided and abetted by the rise of a class of professional grantmakers in the foundation segment of the field,

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[25] Thomas J. Tierney and Joel L. Fleishman, *Give Smart: Philanthropy That Gets Results* (New York: PublicAffairs, 2011), 133.

> who have sought to normalize and rationalize giving…. [P]rofessionalization in philanthropy saps giving of the critical expressive dimension…[26]

Families need not be tempted to formalize operations to the extent of leading foundations like the Bill and Melinda Gates Foundation, the Ford Foundation, and the Lilly Endowment. Yet families must still create their own simple, transparent systems to ensure a degree of thoughtful administration for their operations.

Accountability Frameworks

Another structural issue related to family foundation operations is that private philanthropy is one of the few societal institutions that lacks a trustworthy feedback loop. Governments that alienate citizens can be voted out, businesses that fail to deliver their products will fold, non-profit organizations must rally and motivate their donor constituency or face decline. But aside from the minimal accountability requirements to file an annual tax return and maintain their disbursement quota, private philanthropic foundations are typically accountable only to themselves. Even worse, the only external feedback most grantmaking foundations receive is generally positive, meek gratitude by recipient organizations for enabling their visions, and with resounding silence from those who are declined. It is deceptively easy to be stuck inside an echo chamber where all one hears are repeated refrains of how wonderful they are.

Joel Fleishman, in his stellar work *The Foundation: A Great American Secret: How Private Wealth Is Changing the World,* expands how the lack of feedback within the philanthropic system is a problem:

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[26] Peter Frumkin, The Essence of Strategic Giving: A Practical Guide for Donors and Fundraisers (Chicago: University of Chicago Press, 2010), 77.

> A major cause of the various sins committed by foundations — arrogance, discourtesy, inaccessibility, and the others — is their lack of accountability… [F]oundations have no external stakeholders with effective influence on them, which means that the virtually unhampered freedom that foundations enjoy deprives them of such external feedback and constraints… Operating without accountability and free from the competitive constraints of the marketplace may sound highly desirable, and it surely is — for those who run the foundations. But it creates an unhealthy cocoon-like insulation for foundations, and the rest of the besetting sins are all the more likely to flourish.[27]

The unfortunate result of this lack of feedback is that unless there is great intentionality in learning from outside perspectives, foundations can be tone deaf to their major deficiencies, and dysfunctional patterns can continue for years unopposed. Many foundations remain stuck in patterns of thinking and operating that are never overtly challenged. Fortunately, some foundations are creating ways to encourage feedback, through hiring third-party consultants pledging anonymity for charities, regular surveys of beneficiaries, and ongoing analysis of the philanthropic sector to adhere to best practices.[28]

Frameworks supporting formal faith-based family philanthropy inherently contain challenges for founders and their successors as time progresses. These structures and systems, whether intentionally or unintentionally rigid and constant, will be buffeted by interior and exterior forces for change that will impinge on the philanthropic system over time, impacting not just the family's philanthropy, but the families themselves.

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[27] Joel L. Fleishman, The Foundation: A Great American Secret: How Private Wealth Is Changing the World (New York: PublicAffairs, 2007), 153-155.

[28] Katie Milway, "Funding Feedback." *Stanford Social Innovation Review* 16, no. 4 (2018): 18-25.

Pressures for Change

It is inevitable that Christian families of wealth must prepare for massive internal transitions that will impact the composition of the foundation's membership. Founders age, children grow up, spouses are added to the mix, some marriages fail, new generations are heartily welcomed into the family system, and eventually death comes knocking, sometimes sooner than expected. In my own family, the founders had five children, now all married with children. There are currently twenty-four members in the extended family; within the founders' lifespan and given current mortality levels, it is not unimaginable that four generations will one day be eligible for participation in the family's philanthropy. Corey Finestone, mentioned previously as being a third-generation inheritor, also estimated there were sixty-five to seventy people who are eligible to participate in his family's foundation.[29] A similarly complex environment of ninety-five members was also reported by Charlotte Lamp in her multigenerational family business.[30] These numbers continue to increase exponentially as new generations are born and the family tree keeps extending its branches.

In addition to changes due to natural family growth, faith and cultural constructs are evolving rapidly in a globalized and connected world. Faith commitments are not a static reality. Each new generation acquires faith, or not, and this is shaped by each generation's cultural and theological frameworks. As well, evangelical faith is morphing

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[29] Corey Finestone (pseudonym), interview by author, March 10, 2018, transcript, personal archives.

[30] Lamp, "The Positive Influence of Family Governance on the Family Business System: A Multiple Case Study," 22.

rapidly to assume new understandings of faithfulness.[31] As documented by Quebec philosopher Charles Taylor, Western culture has rapidly shifted to a post-Christian environment that marginalizes traditional religious expression to the sidelines.[32] Hybrid cultures, impacted by globalization, are emerging as traditional culture is significantly altered by technological advances, highly connected communication platforms, vast migration patterns, and diverse lifestyle options.[33] These new contexts shape each generation. As a result, Christian families will also be impacted, both positively and negatively, by these broader cultural shifts.

Generational Differences and Dissonance

Isabel Garcia is both a long-time fundraiser with extensive connections to families of wealth, and a trained psychotherapist. As a member of the Boomer generation and as a Christian, her observations acutely expose the generational differences between Boomers and Millennials. She reflects:

> I think a lot of my [Boomer] generation want to define everything and then go out from there and kind of put fences around it. Whereas I think this [Millennial] generation is much more inclusive, much more open and has a Gospel that's much less truncated. It's more integrated and particularly is focused on more global issues and social justice issues that are bigger than just the local church. This for me would be one of the places where I think is the major difference – my

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[31] James S. Bielo, "The 'Emerging Church' in America: Notes on the Interaction of Christianities," *Religion* 39, no. 3, (2009): 219-232, https://www.tandfonline.com/doi/abs/10.1016/j.religion.2009.02.007.

[32] Charles Taylor, *A Secular Age* (Cambridge, MA: Belknap Press of Harvard University Press, 2007), 12.

[33] Ying-Yi Hong and Bobby K. Cheon, "How Does Culture Matter in the Face of Globalization?" *Perspectives on Psychological Science* 12, no. 5 (2017): 810–823, https://doi.org/10.1177/1745691617700496.

> generation is around institutional structure, whereas the next generation is more around global flourishing.[34]

Within a philanthropic family, these same differences exist yet the challenges are often intensified. Founders can set the agenda without input from next generations, but in doing so the stage is set for a degree of psychological dissonance where next generations pay lip-service to the agenda but no longer embrace (or understand) the values undergirding it.

A concrete example of the challenge dissonance creates within family foundations is when the founders structure the bylaws to encroach upon future generations' agency in leadership. Legal restrictions impede the power of future generations to lead from their own convictions and new cultural reality. Even more common, states James Hughes et al., is the situation where living founders continue to hold power and refuse to permit younger generations agency. They describe this lack of agency:

> In many families with financial wealth, the only voice that counts belongs to the founder or founders. They have materialized their great dream into money. They have spoken forth or set down "the family's" values. They may have enunciated a mission for the family and their future descendants. They very likely are the ones who have established trusts and other structures that map out what assets or income their descendants will get, at what point in life, and even in exchange for what sorts of behavior.[35]

In reaction, younger generations learn to work around the obstructions in place, creating an environment of manipulation and distrust, rather than a transparent airing of differences and mutual decision-making for family and future organizational health.

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[34] Isabel Garcia (pseudonym), interview by author, March 9, 2018, transcript, personal archives.

[35] James E. Hughes, Susan E. Massenzio, and Keith Whitaker, *The Voice of the Rising Generation: Family Wealth and Wisdom* (Hoboken, NJ: Bloomberg Press, 2014), 93.

Communication and Family Dynamics

Formal family philanthropy is challenged by an unusual aspect uncommon in most organizations: the members of the formal operating entity are all related to one another. Where most entities are legally structured to ensure directors are at arm's-length and unrelated, it is permitted that family foundations can be exempt from this commonly understood best practice. Further, there are few, if any, penalties for members if they fail to fulfill their organizational responsibilities. A daughter's failure to follow through with agreed-upon tasks, the grandson's chronic absence at board meetings, and the siblings' frequent bickering, are examples of the types of family dynamics that emerge in such systems.

Kelin Gersick describes this dynamic in foundations where the second generation has assumed leadership and smooth operations are jeopardized. He cautions,

> Leadership is challenged. Marginalized or excluded siblings and branches ask for admission. Complaints about the meetings come in an avalanche. It is as if the founder is finally gone psychologically as well as physically, and the successors are suddenly free to challenge the status quo.[36]

Family systems, whether healthy or unhealthy, will have a dramatic impact on the viability and effectiveness of the family's philanthropy.

To hear one another's voices, one must learn to communicate effectively, a challenge within family systems where entrenched communication and relationship patterns are established from birth. Researchers Roy Williams and Vic Preisser undertook a comprehensive study of 1,000 wealthy families who were transferring wealth to the

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[36] Kelin E. Gersick, Generations of Giving: Leadership and Continuity in Family Foundations (Lanham, MD: Lexington Books, 2006), 109.

next generation. They found that "[o]f every 1,000 estates that were observed in transition, 700 failed. Of the 700 that failed, 420 … failed due to a breakdown of trust and communication within the family."[37] To put it even more bluntly, if 42% of the more than forty trillion dollars at stake in the coming intergenerational transfer (that's $16,800,000,000,000) is at risk due to trust and communication breakdown,[38] surely learning better communication patterns within families is critical.

Within a formal philanthropic setting, all members must learn to let go of their natural family roles and communication patterns to become colleagues in organizational leadership. This is a challenge for founders, who typically have much invested into establishing a legacy of giving for the family and wish to bequeath it to next generations. It is also a challenge for the next generation – some defer to the expectations of parents, thereby losing themselves; others resist the leadership that is offered and withdraw – but in both extremes the family philanthropy is impoverished by the muting of their voices.

Alison Goldberg, in her work with philanthropic families, provides a list, with illustrations, of the sorts of family dynamics that naturally arise:

- Sibling rivalries (Lucy took my tricycle.)
- Family hierarchies and adultism (I'm older so what I say goes.)
- Gender dynamics and outright sexism (You could never win at Monopoly because you're a girl.)
- Allegiances (I want Dave on my team.)
- Conflicts (There is no way I am going to be on Dave's team.)
- Power struggles (I made the cookies, so I am going to decide who gets to eat them.)[39]

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[37] Roy O. Williams and Vic Preisser, Philanthropy, Heirs & Values: How Successful Families Are Using Philanthropy to Prepare Their Heirs for Post-Transition Responsibilities (Bandon, OR: Robert D. Reed Publishers, 2005), 38.

[38] Daniell and McCullough, *Family Wealth Management*, 376.

[39] Alison Goldberg, et al., *Creating Change through Family Philanthropy: The Next Generation*

Goldberg continues, “A whole range of family dynamics are also specifically related to wealth. One of the most common is silence. For many families, talking about money is off-limits – which can be particularly inconvenient in philanthropy when money is the main topic.”[40] Each of these are problematic patterns that frequently crop up in family foundations. Attention must be given to noticing these habitual ways of interacting and countering them; solutions will be offered later in this research.

Evolving Expressions of Faith

Postwar evangelical expansion in North America included prominent ministries founded by spiritual entrepreneurs, such as: Bill Bright (Campus Crusade for Christ), James Dobson (Focus on the Family), Chuck Colson (Prison Fellowship), Loren Cunningham (Youth with a Mission), and Bob Pierce (World Vision and Samaritan’s Purse). These ministries, and many similar likeminded organizations, were built on a new model that depended upon financial support from generous individuals and the fundraising acumen of their charismatic founders.[41] Private Christian philanthropy undergirds the successes of these evangelical parachurch ministries. For example, the internal records of Stronger Philanthropy, a Canadian consulting firm managed by this researcher, demonstrate that between 2015 and 2019, an average of 28% of income

(Brooklyn, NY: Soft Skull Press, 2006), 45.

[40] Goldberg, et al., Creating Change through Family Philanthropy, 45.

[41] Christopher P. Scheitle, *Beyond the Congregation: The World of Christian Nonprofits* (Oxford University Press, 2010), https://www.oxfordscholarship.com/view/10.1093/acprof:oso/9780199733521.001.0001/acprof-9780199733521-chapter-1.

received by 94 Canadian Christian charities came from their top ten donors, most often private foundations or wealthy individuals.[42]

As the expression of faith shifts from one generation to the next, the giving focus will also change, trending away from an internalized, pietistic faith toward an externalized faith that impacts society.[43] Understanding the whole creation as the playground for God's work in the world is a growing feature of progressive evangelicalism. Emma Green featured this trend in her review of American Christian philanthropy in *The Atlantic:*

> The [evangelical] movement is still framed in terms of legacy, '50s-era institutions, and the religious right. But some Christian leaders—including and especially a new generation of wealth-holders—are slowly trying to redefine what evangelicalism looks like.
>
> "What Christian philanthropists see now, maybe more than in past generations, is the full landscape of how they can deploy their [money] toward the entirety of what God cares about," said Josh Kwan, who was recently appointed the head of the Gathering—the [philanthropic networking] organization's first new leader in its three-decade run.[44]

As was documented in *Hemorrhaging Faith*, a research study produced by the Evangelical Fellowship of Canada, it is inevitable that each new generation's perspectives on faith and participation in church will evolve.[45] Millennials do have faith; it just looks very different from the faith of their parents and grandparents. Kaya Oakes,

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[42] Stronger Philanthropy Inc., "Stronger Together Shortlist Analysis 2015-2019," internal company records, accessed November 28, 2019.

[43] Mark A. Noll, *The Logic of Evangelicalism and the Challenges of Philanthropy* (Indianapolis, IN: The Center on Philanthropy at Indiana University, 2007), 25.

[44] Emma Green, "Evangelical Mega-Donors Are Rethinking Money in Politics," *The Atlantic* January 2, 2019, https://www.theatlantic.com/politics/archive/2019/01/evangelical-mega-donors/578563/.

[45] James Penner, et al., *Hemorrhaging Faith: Why and When Canadian Young Adults are Leaving, Staying, and Returning to Church* (Evangelical Fellowship of Canada, 2011), accessed July 10, 2019. http://hemorrhagingfaith.com/.

from the University of California Berkeley and a “revert” to Catholicism, writes about her research exploring the faith journeys of Millennials, and how they are distinguished from that of their parents and grandparents. She voices the way Millennials believe, stating, “We would like to be frank with one another about doubt and faith. We want to reach out to others but not proselytize or convert. We value ritual but do not see it as inflexible and unchangeable. We are adaptable, but we honor the past. We are looking for religion to be that way as well.”[46]

Changing faith paradigms also were a key resonant theme in interviews I conducted with philanthropists and fundraisers. Isabel Garcia highlighted the faith distinctions between the generations with the following observation:

> I think my [Boomer] generation is interested in salvation, whereas the next generation is interested in *shalom*. I think human flourishing is probably more characteristic of the next generation, and my generation is more interested in ‘Are people becoming Christians?’ or ‘Are souls getting saved?’ It’s kind of a disembodied approach. Which means then, the very essence of what faith is, is very, very different between the two. You’ve got formality on the one side and flourishing on the other side. And then what looks religious to both groups is going to be very, very different.[47]

Divergent perspectives on vibrant faith, therefore, will be an issue for next generations leading family philanthropy. Traditional evangelical attitudes towards typical hot button issues such as abortion, science, evolution, gender, sexuality, and marriage equality will inevitably shift as new generations assume leadership. James Davison Hunter, a leading sociology researcher at the University of Virginia, asserts that it is the

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[46] Kaya Oakes, The Nones Are Alright: A New Generation of Believers, Seekers, and Those in Between (Maryknoll, NY: Orbis, 2015), 196.

[47] Isabel Garcia (pseudonym), interview by author, March 9, 2018, transcript, personal archives.

"faithful presence" of people of faith within society together with their neighbors that will influence the world.[48] Wholistic responses to environmentalism, economic inequity, technology, artificial intelligence, the arts, and social enterprise will emerge as faithful Millennials assume leadership in philanthropy for social change.[49]

Changes in Philanthropy

It not just what one funds, but how one does it that will face inevitable shifts as generations mature into full leadership. Millennial approaches to life vary significantly from their Boomer predecessors.

> The Millennial generation is forging a distinctive path into adulthood. Now ranging in age from 18 to 33, they are relatively unattached to organized politics and religion, linked by social media, burdened by debt, distrustful of people, in no rush to marry— and optimistic about the future. They are also America's most racially diverse generation.[50]

This generational shift will impact the way philanthropy is done as well. Researchers Sharna Goldseker and Michael Moody elaborate:

> [O]ur research foretells an important distinction: next gen donors prefer working with smaller organizations over larger ones. Their preference is mainly driven by their obsession with seeing impact, and their desire for closer donor-nonprofit relationships. Next gen donors want to meet the people behind programs. They want to—as one next gen donor puts it—feel that they have some sort of "personal tie" with the organizations to which they give. They don't want to be a small drop in a large fundraising bucket, or a line on a big fundraising thermometer.[51]

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48 James Davison Hunter, To Change the World: The Irony, Tragedy, and Possibility of Christianity in the Late Modern World (New York: Oxford University Press, 2010), 265-266.

49 Goldberg, et al., Creating Change through Family Philanthropy, 11.

50 Paul Taylor, et al., *Millennials in Adulthood Detached from Institutions, Networked with Friends* (Washington DC: Pew Research Center, 2014), 4, http://www.pewsocialtrends.org/2014/03/07/millennials-in-adulthood/.

51 Sharna Goldseker and Michael Moody, *Engaging Generation Impact: Best Practices for*

Goldseker and Moody's research, conducted with next generation philanthropists and presented in their book, *Generation Impact*, advance other ideas of note. This generation prizes collaboration and collective action. They want to learn by doing, giving more than money, through volunteering. They are digital natives who prefer technology when it aligns with the greater purpose. When they are invited into family philanthropy and mentored into leadership with full agency of expression, their contributions will significantly alter the landscape of traditional philanthropy approaches.[52]

Another force for change from outside the family is an ongoing pressure towards the professionalization of one's family philanthropy. Best practice standards in philanthropy are widely available through the leadership of large foundations and networks such as the Council on Foundations, Grantmakers for Effective Organizations, Foundation Center, and Philanthropic Foundations Canada, all of which offer workshops, events, and online resources.[53] Relational hubs rooted in faith such as The Gathering and Professionals in Christian Philanthropy also help to raise the bar on quality processes.[54] Again, a fine balance must be sought where formalized systems to facilitate the volume of grants for good causes will be softened through personal care and engagement in the issues that are raised.

Nonprofits and Fundraisers (21/64 Inc., 2018), 16, accessed December 6, 2018, http://2164.net/NonProfit-Guide-FINAL.pdf.

[52] Sharna Goldseker and Michael Moody, *Generation Impact: How Next Gen Donors Are Revolutionizing Giving* (Hoboken, NJ: Wiley, 2017), 101-102.

[53] Links to these organizations and their resources follows: https://www.cof.org/, https://www.geofunders.org/, https://foundationcenter.org/, https://pfc.ca/. Accessed July 10, 2019.

[54] Links to these relational networks follows: https://thegathering.com/, https://pcpcommunity.com/. Accessed July 10, 2019.

"Moves-management" systems currently employed in nonprofit fundraising are driven by professional fundraisers who seek ever-increasing targets that begin each year at zero. "Moves" can be seemingly innocuous events such as a coffee meeting with a potential donor, or an invitation to a gala fundraising evening. Each move builds on its predecessor to culminate in the goal: a sizable donation for the charity. Such approaches can become impersonal, though they mask themselves as relational interactions with the potential donor: invitations to galas, lunch with the Executive Director, a tour of a facility, a birthday card, an interview for a publication, and linking up on social media are only a few of the many creative ideas for connection.[55] The pressures of such systems, created by the post-war Boomer generation to professionalize revenue flow for nonprofits and tracked by the disciplines of software such as Raiser's Edge, are a constant and unrelenting burden for Christian major donors.

In response to this incessant drive for results and "relationship", philanthropic families construct defensive barriers and institute their own impersonal, technical ways of considering involvement, leading to a breakdown in the connections that should naturally spring from generosity. Many philanthropists suffer from a suspicion that they are being used, mere ATM machines with one purpose of dispensing cash.[56] Alternatively, others are dispensing with the idea of funding other charities in need and driving their own agenda forward through the creation of their own charitable entities.[57]

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[55] Linked In Learning Slide Share website, "Major Gifts: Moves Management Made Easy," slide 20, accessed June 15, 2019, https://www.slideshare.net/NonprofitWebinars/major-gifts-moves-management-made-easy/20.

[56] Goldseker and Moody, *Generation Impact,* 125.

[57] An example of this is the newly created Pro Deo Foundation, which is not focused on disbursing

Conclusion

Christian families of wealth, endowed with the privilege of giving generously, have a unique opportunity. Yet with the endowment of wealth comes great responsibility, even a spiritual vocation, that contains inherent pressures, challenges, and even problems. If not shrewdly addressed, this privilege will be squandered. Existing frameworks around family philanthropy are impacted by donor intent, the family system, questions regarding stewardship, the complexity of operations, and the lack of accountability. Pressures to constantly change also impinge on a family's philanthropy, both internally through natural family growth, generational differences, family dynamics, and communication challenges, and externally through evolving faith and current trends in philanthropy itself. The way philanthropy is practiced differently from generation to generation also has a bearing on family giving. Understanding these obstacles and clear approaches to overcoming them will allow for more fruitful family giving in Christ's name with each new generation.

While these challenges are deeply sensed by many families as they grapple with implications of their legacies, few have addressed them intentionally. Transitioning well implies shrewd stewardship of the privilege these families have been granted. This will be the focus of the following section.

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grants to other charities, but utilizes the bulk of its resources to assist children and youth in poverty in Carpinteria, California as an operating foundation. See https://prodeofoundation.org, accessed July 10, 2019.

SECTION 2:

PRIVILEGE CONSIDERED

Introduction

The privilege of family philanthropy is one that must be stewarded well or millions of dollars available for Christian ministry purposes will be squandered. Administrating one's wealth for the benefit of others in Christian philanthropy is not an easy chore, and in fact, can create challenges for the extended family as they inherit this responsibility. Consider, for example, the following emotional situation experienced by the Finestone family at their annual foundation board meeting:

> … [At our board meetings, we try to give millions of dollars away every] year with integrity and not causing damage to the people we're giving to…. [During the meeting] a cousin of mine started crying, just weeping. Stopped the meeting, because she's just bawling.
>
> And when she finally gathered herself together, she said, 'We're going to ruin my sons!' And at that point her sons were seven and nine … '[W]e're going to turn around and then hand them a billion dollars and expect them to make good decisions when they haven't even been in the room. We're going to kill my sons! We're going to destroy our family! Do you understand?' And suddenly everyone is weeping! Everyone!
>
> … [W]e decided we need to commit ourselves to thinking about how to address that issue: how do we mentor and guide the kids in our families so that when they become board members they'll have some sort of understanding of what stewardship is, and some understanding of what the body of Christ is, and how to have joy in giving it away. Rather than expecting that this is just going to come to us because I'm a part of the family and I'll get an inheritance. My dad says, 'Well, no, the inheritance in our family is the right to help give it away to others.'[58]

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[58] Corey Finestone (pseudonym), interview by author, March 10, 2018, transcript, personal archives.

Common attitudes toward privilege in academia and spinning out into wider contemporary culture often disdain its blessings.[59] Within these contexts it is widely assumed that privilege must be erased to ensure social equality. White privilege, male privilege, heterosexual, cis-gendered privilege, and the privilege of the able-bodied are frequently cited as those which must be subdued in order to hear the voices and expand the experience of those who are marginalized by such privilege.[60] While this line of thinking highlights surrendering space for other perspectives and voices, and discerning how one's privilege provides an advantage, it often leaves those with privilege wondering what to do with their own situation.

The privilege of the Christian philanthropist contains divergent tensions. Wealth and its comforts are relentlessly pursued within society, and even within the North American Christian subculture, a privileged life is often upheld as desirable and can be interpreted as a blessing from God.[61] Yet at the same time, throughout Christian history, there has often been a subliminal message that wealth is dangerous to one's spiritual health.[62]

While access to money and its resulting lifestyle perks are undoubtedly replete with privilege, stewarding wealth is linked with significant burden as well; this awareness can come unexpectedly for next generation inheritors. This downside may be invisible to

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[59] Greg Lukianoff and Jonathan Haidt, The Coddling of the American Mind: How Good Intentions and Bad Ideas are Setting Up a Generation for Failure (New York: Penguin, 2018), 70.

[60] Allan G. Johnson, *Privilege, Power, and Difference* (New York: McGraw-Hill Education, 2018), 14.

[61] Gary Moore, *Faithful Finances 101: From the Poverty of Fear and Greed to the Riches of Spiritual Investing* (Philadelphia: Templeton Foundation Press, 2003), 10-11.

[62] Helen Rhee, *Loving the Poor, Saving the Rich: Wealth, Poverty, and Early Christian Formation* (Grand Rapids, MI: Baker Academic, 2012), 111, ProQuest Ebook Central.

those not experiencing this privilege. They include family dynamics mixed with business considerations, working together in the family business, grandiose expectations of inheritance, responsibilities of ownership, isolation from those less wealthy, and more. One example concerns young adults in their twenties and thirties. Spoiled by their affluent upbringing, and lacking experiences of resilience, so-called “trust fund babies” often evidence immature characteristics that are long earlier purged from their peers with less access to wealth and opportunity.[63] According to Kenneth Kaye, substance abuse, codependency, and other relational dysfunctions are all common markers of the family business environment.[64]

Those living into this privilege requires assuming certain responsibilities unfamiliar to their peers. Descendants of philanthropists are expected to give back as they represent the family, direct the disbursement of significant sums of money, and are invited into civic and organizational leadership. Kerry Alys Robinson cites responsibilities from within her own family:

> Every young adult in the Raskob family knows what it is like to be encouraged to assume roles of leadership in the Raskob Foundation even when we are teenagers. From the moment we are eighteen and formally invited into membership of the foundation and throughout our twenties, we are encouraged to represent the family at national Catholic gatherings, to make site visits to potential grantees, to serve as chairs of committees, to speak publicly, and to stand for election to the board of trustees of the Raskob Foundation. It is perhaps the single most effective defining characteristic of the Raskob Foundation: the youngest members of the family are the ones most encouraged in leadership opportunities.[65]

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[63] Manfred F.R. Kets De Vries, Randel S. Carlock, and Elizabeth Florent-Treacy, *Family Business on the Couch: A Psychological Perspective* (West Sussex, UK: Wiley, 2007), 274.

[64] Kenneth Kaye, “When the Family Business Is a Sickness,” *Family Business Review* 9, no. 4 (December 1, 1996): 349-350, https://doi.org/10.1111/j.1741-6248.1996.00347.x.

[65] Kerry Alys Robinson, Imagining Abundance: Fundraising, Philanthropy, and a Spiritual Call to Service (Collegeville, MN: Liturgical Press, 2014), 100.

For Millennial Christians on the verge of philanthropy leadership, becoming conscious of one's privilege, then responsibly utilizing it as a platform for humble involvement in the world is the opportunity provided as they seek their life purpose and vocational path. The focus of this section will be to consider this burdensome inheritance and its implications, both from a Biblical perspective and characteristics of how it is lived out by the descendants of Christian philanthropists.

A Hymn on Stewarding Privilege

According to New Testament scholars, St. Paul's quotation of an Early Church hymn in his Letter to the Philippians is an early fragment of Christian liturgy.[66] This ancient hymn points to the Early Church's understanding of Christ's purpose in the incarnation and his ensuing crucifixion. Once adopted into the canon, this pattern became the description of a pathway worthy of imitation that challenges the universal church, including even today's philanthropists. It reads, in part:

> Let the same mind be in you that was in Christ Jesus,
> who, though he was in the form of God,
> did not regard equality with God
> as something to be exploited,
> but emptied himself,
> taking the form of a slave,
> being born in human likeness.
> And being found in human form,
> he humbled himself
> and became obedient to the point of death—
> even death on a cross.[67]

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[66] Ralph P. Martin, A Hymn of Christ: Philippians 2:5-11 in Recent Interpretation and in the Setting of Early Christian Worship (Downers Grove, IL: IVP, 1997), 27.

[67] Philippians 2:5-8, NRSV.

In his life and death, Jesus stewarded immense privilege as the Son of God. His eminent status was not something to be exploited for his own gain, but rather he chose to set aside his privilege, even taking the form of a slave and later dying a gruesome death. Though common interpretations of the poem refer to Christ's *kenosis*, or self-emptying, Bradley Jersak suggests that "*Kenosis* is not a surrender of the divine attributes; *kenosis* defined as self-giving or self-donation is the premier expression of God's nature – of God's love and grace – seen most clearly on the Cross."[68] This is not like the emptying of a bucket of water that will dry up and be depleted, he elucidates, but more akin to the constant life-giving flow of a waterfall.[69] Some interesting parallels exist here between the way of Christ who uses his privilege to benefit others, and the challenge for Christian philanthropists who have access to a perpetual source of funds destined for generous engagement with the world.

In his analysis of the hymn, Jersak concludes,

> Those who exploit their privilege, who desperately cling to it or use it to bludgeon others will, in the end, suffer loss. Those who lay it aside will follow the Jesus Way to the Cross, through the Cross, beyond the tomb and into the vindication of the one Voice that finally matters. "The way down is the way up."[70]

Releasing privilege, as illustrated by Jesus in channeling it as a never-ending stream of goodness, truth, and beauty for the world, was his way of stewarding it well. There is a surrender in letting go of the power and prestige and conferring it to others, but in the Christian story, it is constantly regenerated in death-defying life for the world.

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[68] Bradley Jersak, *A More Christlike God: A More Beautiful Gospel* (Pasadena, CA: Plain Truth Ministries, 2015), 99.

[69] Bradley Jersak, e-mail message to researcher, July 19, 2019.

[70] Bradley Jersak, *A More Christlike Way: A More Beautiful Faith* (Pasadena, CA: Plain Truth Ministries, 2019), 114.

Understanding one's privilege as being part of God's kingdom released into all creation is an interpretation supported by Daniel Bell. The ministry of giving supports and extends the kingdom as God intervenes in the world through the church. He states,

> But the gospel is that we are not alone — or left for the time being with a Stoic or deistic God who at best only manages sin. Against the Christian defenses of capitalism that relegate the divine economy entirely to the future, the Christian tradition proclaims that the kingdom of God is at hand (Matt. 4:17). At the heart of the Christian faith is the confession that in Christ the kingdom has come near, which means that God's economy is a real, genuine possibility here and now.[71]

Stewarding one's inherited privilege here and now requires shrewd and prayerful discernment as one imitates this pattern in Christ. For Christian families of wealth, the privilege of philanthropy and its stewardship infers that founders recognize that created wealth is not their own but offered as a gift to others. They aspire to live a life of surrender to their own limitations, and pour into their offspring, empowering next generations in leading well with the resources at hand. Successors committed to this vision inherit this responsibility and can learn to continue releasing generosity for the benefit of others. Rather than building an empire based on status and wealth, Christian philanthropy can become distinct from secular philanthropy as it models itself after Christ's example of surrender. This underlying motivation and its implementation must undergird all activity for philanthropy to distinguish itself as Christian. The balance of this section will address various common models for succession planning taken by Christian families, and how to avoid the pitfalls that often trip one up in the process of stewarding this privilege.

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[71] Bell, The Economy of Desire, 126.

Succession as Stewardship

With the surge in wealth generation by family foundations created by the Boomer generation in the latter part of the twentieth century,[72] it is fair to suggest that many are only now beginning to grapple with issues of succession as founders determine next steps for their legacies. Philanthropy is generally only one subsection of the legacy, as concerns around future ownership and management of the family business and inheritance considerations of the family estate are also part of the complex, intertwined environment. Wealth managers, philanthropy advisors, and researchers such as Marcovici,[73] Bentall,[74] Lamp,[75] and Daniell and McCullough[76] all support a variety of approaches – technical solutions under the guidance of professionals such as accountants and lawyers, formal governance of family affairs, and less-structured aspirational conversations by founders with their descendants. The wealth management industry selectively targets high net worth families and provides intimate, boutique-level administration and services for family finances, including the creation of philanthropic platforms they refer to as "wealth-planning tools".[77]

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[72] *Giving USA: The Annual Report on Philanthropy for the Year 2018* (2019), 34.

[73] Philip Marcovici, The Destructive Power of Family Wealth: A Guide to Succession Planning, Asset Protection, Taxation and Wealth Management (West Sussex UK: Wiley, 2016), 124-132.

[74] David C. Bentall, *Leaving a Legacy*: *Navigating Family Business Succession* (Pickering, ON: Castle Quay Books, 2012), 319-321.

[75] Lamp, "The Positive Influence of Family Governance on the Family Business System," 196.

[76] Daniell and McCullough, *Family Wealth Management*, 375-391.

[77] Marcovici, The Destructive Power of Family Wealth, 178.

Technical solutions such as those provided by professionals can certainly be helpful, but such an approach misses the nuanced, relational dynamic within family life, and may also not align completely with the values the family wishes to advance. As these advisors indicate, families are weak at robust planning with the extended family, documentation and dissemination of the plan, and an explicit process of onboarding new leadership from inheriting generations. Williams and Preisser have a vision for something greater; they believe the family has an opportunity to advance their legacy by bringing descendants into philanthropy leadership as an effective means to prepare heirs for future leadership.[78]

Various models exist for the integration of next generations into family philanthropy. Most common is an invitation for next generations to join the board, and to learn through inclusion at the governance level.[79] Others carve out a small percentage of annual granting to be directed by younger members.[80] Corey Finestone's family developed an experiential program in which a cohort of the family's teenagers would take a trip to a new city each year, interviewing applicants and conducting site visits before deciding together with their mentor on the best disbursement of their grants.[81] Finally,

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[78] Williams and Preisser, Philanthropy, Heirs and Values, 1.

[79] Robinson, Imagining Abundance, 100.

[80] In my family's foundation, between 2001-2015, each member was offered $10,000 per year to allocate to charities of their choice. To encourage deeper charitable engagement beyond using the foundation's money, they were also required to volunteer in some way with the recipient charity. Since membership included all descendants of the founders over age twelve, teenagers and young adults developed their own experiences in volunteering, granting, and reporting back the progress of their grant at the foundation's annual general meeting.

[81] Corey Finestone (pseudonym), interview by author, March 10, 2018, transcript, personal archives.

Shawna Goldseker has developed an array of resources that are available to assist next generations in philanthropy leadership through her organization 21/64.[82]

Each of these models is a welcome contribution to empower next generations in the stewardship responsibilities of family philanthropy. Gaps do exist, however, and should be addressed to provide a more comprehensive strategy for onboarding emerging members in philanthropy leadership. A strategy that accounts for generational differences and offers agency to next gen emerging leaders is paramount. These will be explored further in next sections.

The Bumpy Road of Transition

While all institutions evolve at some point, change is often difficult. Leadership transitions for family foundations are no exception. As one considers the privilege embedded within family foundations, certain characteristics make this transition especially challenging. Five potholes in the road impede the way for a smooth transition. These include unexamined myths and assumptions that influence perceptions of reality, the omnipresent shadow of the founders, feeling paralyzed by real or imagined lack of agency, the inability of the successor to differentiate him or herself, and unarticulated planning around succession. Each of these must be navigated as the family journeys through the succession process; they will be examined below in further detail.

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[82] 21/64 Website, accessed July 17, 2019, https://2164.net/.

Myths and Assumptions

The story of family philanthropy is a grand story: in the beginning, the founder had a great idea, she built a business, took risks, and against all odds, because of her ingenuity and fortune, achieved success. Vast wealth is then shared with the world, offering support to the needy and grants to organizations doing good. In the telling of the story, however, successors hear of great accomplishments but the many challenges that were part of the journey toward success can be minimized. Additionally, as memories fade and distort, the actions of the protagonist become more spectacular, mistakes are airbrushed away, and the involvement of others is minimized. The story takes on the aspect of legend, the founder becomes heroic, and future inheritors can tend to feel diminished in comparison to the myth. Andrew Keyt counsels,

> …[W]hen a myth focuses exclusively on the founder…, it stifles the family and curtails the legacy. The shadow lengthens as the story is interpreted by family, employees, customers, and the community. Wanting to create a heroic leader, we overlook the weaknesses, failures, and idiosyncrasies that are also a part of the story. And wanting to bask in the glory of the myth, many predecessors encourage its growth and development. In the mythical version, the predecessors become like deities.[83]

It is audacious to resist a deity, and when the work of Christian generosity is lauded as God's work and deemed to have God's blessing, the construct becomes nearly impermeable to critique. These myths around the creation of family wealth could be considered "creation myths": they provide the infrastructure around the family story and guide its future development.

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[83] Andrew Keyt, Myths and Mortals: Family Business Leadership and Succession Planning (Hoboken, NJ: Wiley, 2015), xxii.

The damage of these creation myths to the next generation is real. Operating within an unrealistic family mythology, successors struggle to find a sense of purpose and achievement and never seem to measure up. Keyt believes that:

> This destructive mythology … eclipses the talent of future family leaders, who are unable to find their sense of identity and strength, to discover their passions, and to determine what beliefs they hold in common with parents and family, and where they differ. Caught in this shadow, successors can wilt and die. They often succumb to entitlement, addiction, depression, and unhappiness. When the successor gets caught in the shadow, these families tend to deteriorate into infighting, anger, self-protection, and selfishness.[84]

Other myths also exist. Founders often assume their idea for philanthropy will be shared by their offspring. Michael Yung, a Canadian major donor fundraiser for a prominent Christian charity, offered this example:

> …[T]here was a philanthropist who's actually a gem of a man and one of our earliest supporters, and his older kids resented the wealth because they saw it coming from him working too hard and that work ended up costing him his marriage. And so, they associated this money as being too costly and because of that then they didn't want anything to do with the family foundation. They were even reluctant to be identified in a very positive way. The foundation had done extra work to help a lot of people, but there was a resentment of that just because of what that meant.
>
> And his kids still loved their dad … But that was a symbol of a part of their life that they regretted and that they wished they could change, and they were powerless to do so. And so now, their expression of power was to just not participate… I wonder how many cases exist like that out there.[85]

Manfred Kets de Vries' work in organizational psychology and economics uncovers the types of myths that exist within family business systems and paralleled in family foundations. In *Family Business on the Couch*, he and his fellow researchers name the myths of harmony, stereotyping, martyrdom, scapegoating, and messiahship as

[84] Keyt, Myths and Mortals, 5.

[85] Michael Yung (pseudonym), interview by author, March 9, 2018, transcript, personal archives.

commonly occurring.[86] While all of these can exist within family foundations, of particular interest to Christian families is the myth of harmony that is reinforced by the faith commitment of the family. The concept that Christians must get along and that any disruption to the apparently peaceful status quo is unchristian is characteristic of church culture.[87] Kets de Vries claims that "notwithstanding an enormous amount of evident conflict and tension within the family, the principal members of some family businesses often buy into the myth that harmony reigns in their business, ignoring the reality of the situation through denial and idealization."[88] For the Christian family where harmony is idealized, this tendency is even greater.

Another type of myth relates to how some families operate as if business and family relationships can be segmented into convenient compartments, believing that business or foundation decisions will not affect personal relationships.[89] For example:

- A daughter is empowered to lead the family philanthropy as Executive Director, but her mother retains power to veto decisions and control finances;
- A grandson is hired in the family business, fired by the founder for apparent incompetence, yet expected to joyfully participate in the philanthropy mission; and
- Spouses of children are sidelined from involvement and decision-making in family philanthropy, leading to resentment by the in-laws.

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[86] Kets De Vries, et al., *Family Business on the Couch*, 105-109.

[87] Peter L. Steinke, How Your Church Family Works: Understanding Congregations as Emotional Systems (Washington, DC: Alban Institute, 1993), 25.

[88] Kets De Vries, et al., *Family Business on the Couch,* 105.

[89] Bentall, *Leaving a Legacy*, 124.

Examining the predominant myths within a foundation with transparency and honesty, and exploring how to dismantle them and better communicate, is necessary to avoid these types of assumptions from guiding the family.

The Founder's Shadow

A second bump in the road commonly trips up successors as they embark on their work of leadership. Even if the work of dismantling myths is underway, the founder's shadow often looms over second and subsequent generations of family philanthropy. While foundations invite next generations into governance, participation can be reduced to mere tokenism. Katelyn Greenman, a second-generation inheritor, describes the emotional dilemma of operating within the shadow of her influential parents: "…[T]here's the concern of hurt feelings … and then, you know, trust. I don't know if they fully trust us to run the foundation."[90]

Where the founder's shadow is cast, decisions that are taken by successors are often like walking on eggshells, made tentatively, and without conviction. Gersick warns, "When the founder unilaterally determined the purpose of the foundation but at the same time also assumed perpetuity, sooner or later there was typically a slide into passivity, obligatory participation, and a loss of vitality."[91] According to Avloniti et al., this is not the pathway to organizational health for the family's legacy.[92]

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[90] Katelyn Greenman (pseudonym), interview by author, March 2, 2018, transcript, personal archives.

[91] Gersick, *Generations of Giving*, 90.

[92] Angeliki Avloniti, Anastasia Iatridou, Ioannis Kaloupsis, and George Vozikis, "Sibling Rivalry: Implications for the Family Business Succession Process," *International Entrepreneurship and Management Journal* 10, no. 4 (2014): 663-664.

When successors lack their own coherent vision for generosity and are obscured by the founder's shadow, interpersonal conflict can emerge among family members. Laclan Whatley, a researcher in family business systems at Trinity Western University, identified the prominence of this shadow as one of the reasons business succession failed.

> …[T]he founder's shadow is defined as "the generation's excessive and inappropriate involvement in an organization, possibly causing social disruption in the organization". Not surprisingly, in the FOBs [Family-Owned Businesses] where the founder's shadow was present, there were higher levels of conflict after the succession, regardless of the generation (first or second)… FOB owners who want to increase the successor's chances of success need to decrease the size of their shadow and let go.[93]

The founder's shadow can extend far beyond the family circle. In communities where the family's philanthropy operates, civic organizations often publicly laud the family's altruism in ways that inadvertently affect all family members. Williams and Preisser note one example:

> We have observed that while the family name was a source of pride for the parents, it could be a source of continuing (unwanted) expectations for the heirs. Seeing the family name connected with university buildings, hospitals, and community improvements often proved embarrassing to young people trying to establish 'normal' relationships.[94]

In such situations, it can be disillusioning for next generations to acknowledge that some relationships that form within a community may be propelled by the expectation of access to grant money.

Decreasing the size of the shadow and releasing next generations to freely lead is the task of the first generation. Without empowering the next generation to lead on their

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[93] Laclan Whatley, "A New Model for Family Owned Business Succession," *Organization Development Journal* 29, no. 4 (Winter 2011): 23, 25.

[94] Williams and Preisser, *Philanthropy, Heirs and Values*, 97.

own accord, the founder's shadow can overwhelm subsequent generations and be an obstacle to healthy succession.

Lack of Agency

The third obstacle encountered by successors in leading next generation family philanthropy is a result of the long shadow described above. Leading in this context results in a perplexing lack of agency for successors. Isabel Garcia explains in her interview:

> I worry about the paternalism in [founders] versus a collaborative approach. The degree to which [they're] telling versus listening. I worry about control and mastery and orchestration. I've been in some situations where it's very clear the parents are trying to control from the grave. So, they are actually going to be dead and buried, but they are setting everything up so that they'll still be controlling what happens with their money… [O]n the surface it looks like that's great, they're drawing the kids in, they're equipping them, they're bringing them into the foundation, they're sitting on the board. That's all really good, but I wonder whether the control and mastery and orchestration piece is in fact part of what's going on.[95]

While they may be named to the board, or designated as a successor, next generation leaders may be unable to lead effectively due to constrictions on making and implementing decisions. In some cases, founders make decisions in the hallway once a clear process has already been agreed to at the board room table. In others, legal barriers such as restrictive by-laws created by founders impede successors from having full agency. In other situations, founders never seem to surrender control and are involved in operational matters well into old age.[96]

[95] Isabel Garcia (pseudonym), interview by author, March 9, 2018, transcript, personal archives.

[96] Kets De Vries, et al. *Family Business on the Couch*, 118.

Gersick sees an unfortunate result in founders retaining unilateral dominance for too long: "Staying on as director or chair of the trustees in one's seventies and eighties sends a message that the foundation is a personal arena, a platform for the demonstration of family hierarchies and status, rather than a continuity-focused working organization."[97] Stepping aside early and patiently investing into empowering the next generation is a far more valuable contribution to viable family philanthropy, and is an investment into ensuring the longevity of the family's giving.

Lack of agency can also be experienced by those successors who perceive they do not have a choice but to accept the responsibilities offered to them in grantmaking: family expectations and pressures compel them to accede. While they are offered choice, sometimes family dynamics or implicit pressures may cause a successor to believe they have no option but to play the role offered. Miruna Radu Lefebvre and Vincent Lefebvre, researchers who studied French family businesses, describe this dilemma:

> Being a family business leader is perceived as a question of destiny. Children born into family businesses are conceived as inherently endowed with a 'sacred' mission, that of receiving, preserving and transmitting the family business legacy to future generations. This legacy thus requires fidelity to tradition and a life-long commitment…. Management transfer is a 'gift that one cannot reject', and in this projected future next generation members do not really have the choice of role entry.[98]

Lack of agency becomes a roadblock for successors when the founders fail to shift to a new relational dynamic with their adult children, or when descendants refuse to

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[97] Kelin E. Gersick, *Generation to Generation: Life Cycles of the Family Business* (Boston: Harvard Business School Press, 1997), 235.

[98] Miruna Radu Lefebvre and Vincent Lefebvre, "Anticipating Intergenerational Management Transfer of Family Firms: A Typology of Next Generation's Future Leadership Projections," *Futures* 75 (January 1, 2016): 76. https://doi.org/10.1016/j.futures.2015.10.010.

grow out of their dependency. Goldseker and Moody cite Steve Treat, a licensed therapist from the Council for Relationships, who advocates descendants must "achieve peerage".[99] They continue,

> Parents and children … are used to a power dynamic where the parent is in charge of the child; however, when children come of age and are given philanthropic responsibilities, the parent-child dynamic must shift to one of peers to enable a healthy working relationship. Their relationship must evolve to embrace this new reality, or children can be left feeling infantilized or undermined.[100]

For families that want to nurture an intergenerational transfer of leadership, care must be taken to nurture an environment where true freedom of choice and agency for younger members is created.

Undifferentiation

A lack of agency is often a symptom of the next bump along the road. Family systems theorists from the Bowen school concur that each generation, and every individual, must differentiate themselves in order to more completely own and fulfill their life calling.[101] Undifferentiated adults lack maturity and purpose; self-differentiation leads to healthier family environments and should not be considered a threat to family harmony. Instead, it leads to a place where adults within a family learn to accept and encourage each member to pursue their own unique calling within life and as a part of the family system.

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[99] Goldseker and Moody, *Generation Impact*, 230.

[100] Ibid.

[101] Bowen Center, "Theory," accessed April 25, 2019, http://thebowencenter.org/theory/.

Charles Collier, in his classic, *Wealth in Families*, defines the concept: “Differentiation describes one’s ability, over a lifetime, to strive to be a little better at 1) thinking for one’s self and taking a principled stand on issues, 2) making thoughtful decisions based more on facts than on emotions, and 3) being less anxious and reactive in the face of intense family emotionality or resistance.”[102] He elaborates as to how this process of differentiation is undertaken in philanthropic families:

> Family philanthropy can function as an activity promoting genuine family togetherness. The next generation may, however, also experience it as a pressure to conform. How then can a family negotiate a succession plan that respects the wishes of the foundation’s original donor while striving to enhance the individuality of the next generation?[103]

This work of blossoming into who one is created to be and discovering one’s unique voice is the work of maturity for all adults. The wealthy family’s distinct reality, however, adds challenges to this quest for next generations. Hughes et al. describe how one’s identity can be subsumed by the larger family story. They state, “The unnatural, legal relationships of trusts or business entities; the family name and all it entails; the expectations for togetherness, even in vacations or choice of residences – all these complications can cause you to forget who you are and where the boundaries of your own voice or your own life lie.”[104]

Despite the challenges inherent at articulating oneself in the face of family myths and assumptions, living under the omnipresent shadow of the founder, and oftentimes lacking agency as adult leaders, the responsibility to differentiate belongs to the

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[102] Charles W. Collier, *Wealth in Families* (Cambridge, MA: Harvard University Press, 2006), 98.

[103] Collier, Wealth in Families, 3.

[104] Hughes et al., The Voice of the Rising Generation, 96.

successor. Edwin Friedman cites a "devaluation in the process of individuation"[105] as that which cripple successors from leading well. Many shrink at the enormity of the task, and foundations limp along led by second or third generations who have not claimed ownership of their own authentic selves, and who meekly defer to the dominant narrative established by the founder. Keyt believes that attempting to merely replicate the founder's practices is not helpful for the successor, or for the vibrancy of the foundation being led. He states, "The chase to be like someone else is exhausting, unending, and unattainable. A son or daughter cannot catch up to that which he or she was never meant to be."[106] And yet, it is often easier to externally imitate while silently squelching one's deeper values and priorities.

Keyt counsels confronting this inauthenticity in order to blossom into the fullness of who the successor is designed to be:

> Each successor must undergo a crisis of identity. In this crisis, the emerging leader faces the risk of losing herself in their predecessor's myth. The leader will be forced to confront the impression that he or she is a carbon copy of the predecessor. At this pivotal moment, a successor can choose to step away from the myth and towards his or her authentic self.[107]

This transition will not be without struggle. But emerging into a more authentic place of service and leadership within the family system can only be enriching for the system over time. It is when authenticity amongst all members prevails that the beginnings of a healthier future forward can commence.

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[105] Edwin Friedman, *A Failure of Nerve: Leadership in the Age of the Quick Fix* (New York: Church Publishing, 2017), 13.

[106] Keyt, Myths and Mortals, xxiv.

[107] Keyt, Myths and Mortals, 26.

Lack of Planning

The final roadblock toward a healthy succession can occur for a variety of reasons. Lack of planning by the principals of a foundation could be rooted in fear of surrendering control to one's descendants – perhaps they are viewed as unready, incapable, or not trusted.[108] At times, decisions regarding succession are communicated in sidebar conversations on road trips or at the family cottage, but undocumented, not formalized, and not shared with others: a recipe for family conflict in the future.[109] Perhaps, in the case of married couples or multiple founders, a consensus on the future of the family's philanthropy has not yet occurred, leading to decision-making paralysis due to anxiety and the vulnerability of the moment.[110] This lack of concrete planning through a series of family meetings and committed to by all in written format impedes smooth transitioning and poorly stewards the privilege that has been granted.

Gersick acknowledges that there are two pathways forward. One, the pathway that lacks intentional planning with next generations, can support the founder's philanthropic dreams but fail to pass the legacy forward. The other includes both founders and descendants in a collaborative, intentional planning process. He counsels,

> …[E]ach generation needs to choose whether it feels a primary responsibility to its present or to the future. If the governing group, whether a founder or those who have followed, commit themselves to accomplishing a particular philanthropic agenda, they can focus all of their energy on doing that as effectively and efficiently as possible…. If, on the other hand, the first priority of

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[108] F. R. Manfred and Kets De Vries, "The Dark Side of CEO Succession." *Harvard Business Review* 66, no. 1 (1988), 57. https://alliance-primo.hosted.exlibrisgroup.com/permalink/f/fui76t/TN_proquest227850617.

[109] Bentall, *Leaving a Legacy*, 45.

[110] Gersick, Generations of Giving, 5.

> the founders or leaders is to create an opportunity for people they care about to discover their own passions and to enact their philanthropic values, the task is a very different one. Then the leaders need to invest in collaborative agenda setting, in mentoring and training, and in the foundation itself. The first path is charitable giving; the second is institution building. Both are noble ways to contribute, but you cannot gain the benefits of one by investing solely in the requirements of the other.[111]

The challenge in this case is for the founders and next generations to ascertain if they desire to cultivate philanthropic legacy or not. While each family is unique, intentional planning by founders towards stewarding a legacy past their lifetimes may be the more strategic option.

David Bentall, a third-generation inheritor of wealth derived in Vancouver real estate, continues this contrast between those who defer planning and those who undertake this work. He begins with an illustration of a surprising lack of planning by the founders. "[S]ome families resolve to let Dad and Mom make virtually all charitable decisions until they die. Then, after their parents are gone, the kids assume responsibility for all charitable decisions. This way of transitioning decision-making authority … is certainly simple, but it also creates a very abrupt transition."[112] This approach means that inheritors, by then in the later years themselves, would begin their philanthropic activity at an age when they themselves are retiring – a sadly inadequate stage if one values fresh thinking and relevance for family philanthropy.

In contrast to the consolidation of decision-making with just the founders, Bentall advocates an incremental model of transitioning ownership and control to next generations that occurs over years. Rather than proposing a clean division of authority

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[111] Gersick, Generation to Generation, 241.

[112] Bentall, *Leaving a Legacy*, 213.

that transitions immediately, he suggests embracing the "messy middle" where shared responsibility for a segment of the giving is part of the transition.

> It is possible to simultaneously pursue a strategy of sharing power…. This approach provides for a partial transition of authority while at the same time some elements of decision-making are shared. In practice, this requires both generations to listen to one another to either compromise or collaborate. To achieve this, the elder generation will need to voluntarily relinquish some authority to the next generation.[113]

While this would undoubtedly be a "messy" process, families will be enriched by a commitment to this model that brings its members together.

Conclusion

The privilege that is held in the hands of Christian families of wealth exists for the benefit of others. An incredible opportunity exists for faithful families to empower next generations to continue this legacy into the future. As transitions in leadership occur in these families, one hopes that this same motivation will be upheld and continue to be nurtured; without this successful navigation, these endowments may lack direction and fail to nurture ongoing relevant investment into expressions of Christian faithfulness. Unfortunately, statistics demonstrate that the majority of intergenerational wealth transfers eventually fail by the third generation. Williams and Preisser demonstrated that 70% of 3,250 families researched were unsuccessful in this process.[114] While the money may have transitioned well, the heirs did not.

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[113] Bentall, *Leaving a Legacy*, 215.

[114] Williams and Preisser, *Philanthropy Heirs and Values*, 22.

Key to a successful transition is practical preparation for next generations in carrying the responsibility of philanthropy.[115] Transitioning leadership for one's foundation will necessarily chart a course with bumps in the road: family myths and assumptions, the preponderance of the founder's shadow, issues of agency for its members, the process of self-differentiation, and the need for planning together. Concrete approaches to undertaking this journey, explored in the next section, will guide a family toward fulfilling their mission and ensuring a legacy of hope. Like a self-giving waterfall, Christian family philanthropy can continue nourishing others for generations into the future if this privilege is stewarded with wisdom.

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[115] Williams and Preisser, *Philanthropy Heirs and Values*, 23.

SECTION 3:

PRIVILEGE LEVERAGED

Introduction

The privilege of wealthy Christian families is conferred by God to benefit others outside the family unit, as they express their faith in Christ and follow his example of surrendered service through giving. As they steward this gift, succession becomes an inevitable challenge. Despite inevitable bumps along the road to transition, the way will be smoother with close attention to a dismantling of family myths, the dissipation of the founder's shadow, the creation of agency for successors, embracing an environment where self-differentiation is welcomed, and planning well for the future together. Entrepreneurial founders grew successful businesses through understanding and applying the concept of leverage: taking resources at hand and multiplying their potential. Applying this same approach to family philanthropy means that next generations will assume their mantle of leadership and will be empowered to discover and pursue the work of God for their generation and in their context, and lead to greater, lasting impact.

Leveraging the privilege to one's descendants begins inside the family circle. Creating a family culture of generosity is the first step in nurturing values of sharing the privilege with others. One example is the Barry family from Ontario. Second-generation inheritor, Silas Barry, recounts his family's priorities:

> …[F]rom a very young age it's been driven into me that the Barrys are givers. Give. My dad tells me that's just who we are. I remember my dad, me being a younger man, perhaps not even a man yet, looking at a situation and being like, 'Dad, why are you doing that for that guy? He's taking advantage of you!' My dad was doing something kind for someone, like buying him a plane ticket or something … [Y]ou just see these things happening again and again and,

> eventually, it kind of irked me for some reason. And I said, ‘You don’t even have a relationship with him! What are you doing?’ And he just looked at me and he said, ‘Silas, you always err on the side of generosity. Always.’… And not just money either … My parents are so generous with their condo in West Palm Beach for example. I can’t even imagine why they would be that generous with it. Or their place in Muskoka. Or we’re buying plane tickets for people or whatever. Whatever it is, my parents are very, very generous people. They’ve been a wonderful model.[116]

While the supposed reputation of the Millennial generation is that of being entitled, self-absorbed, and slow to commit, sociological researchers Bibby, Thiessen and Bailey assert that this generation bears marked similarities to their elders at this stage. Additionally, they possess unique generational strengths that will be beneficial to the family’s philanthropic enterprise. After interviewing over 6,000 Canadians in two national surveys (in 2015 and 2016), the researchers concluded,

> …[I]n many ways, Millennials are not very different from previous generations. The things that matter to them, their values and sources of enjoyment, hopes and fears, expectations, and so forth are not that dissimilar from their parents or grandparents … [However], this emerging generation of Canadian young adults is not only the most diverse we have ever known; they also are exhibiting greater levels of social compassion than adults who have gone before them ... [T]he sky is not falling with Millennials. Here again we can say with a high level of confidence that ‘the kids will be alright.’[117]

Younger generations must be permitted a pathway to agency as co-stewards and eventual principals of the family endowment otherwise its future is at risk of not realizing its potential.[118] Rather than merely opting into the existing status quo that lies beneath the dominant shadow of the founders, creative opportunities can be created for successors to

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[116] Silas Barry (pseudonym), interview by author, March 5, 2018, transcript, personal archives.

[117] Reg Bibby, Joel Thiessen, and Monetta Bailey, *The Millennial Mosaic: How Pluralism and Choice are Shaping Canadian Youth and the Future of Canada* (Toronto: Dundurn, 2019), Kindle, loc. 3669.

[118] Williams and Preisser, *Philanthropy Heirs and Values*, 23.

adopt their own strategies for philanthropic engagement. They must be assured that their voices are heard and attended to as key stakeholders in the foundation's ongoing development. General criteria for what form this will take will be presented in this section, with one specific model for empowerment presented in the artifact that follows. But to enable successors to develop their own philanthropic platform aligned to the family mission, there are a few conditions that must be attended to. These will be explored now.

Creating Conditions for Christian Philanthropy Succession

Positive change doesn't just happen through inheritance. It must be intentionally crafted and carefully nurtured. For Christian philanthropic families, seeking God's leading in prayer and mutual discernment is also critical. The conditions for success in the intergenerational transition process can become personally rewarding for all members, individually as well as collectively.[119] The process begins with a family's commitment to succession in the development of a plan with clear communication among all members throughout the process. As well, both founders and emerging next generation leaders will have specific attitudes to cultivate that are specific to each group. Embracing this wisdom will allow for robust and creative continuity for the family's philanthropy.

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[119] Kenneth Kaye, "When the Family Business Is a Sickness," *Family Business Review* 9, no. 4 (December 1, 1996): 347–68, https://doi.org/10.1111/j.1741-6248.1996.00347.x.

Planning for Succession

In developing conditions for succession, Michelle Ballet asserts that, "[T]he next generation as well as the founding generation [need to be] active participants in the process."[120] To cultivate ownership by all members in the process, however, Kelin Gersick believes participation must be more than token. In his work of guiding families through succession, he often observes allegiance to the idea of collective participation, but actual involvement by next generations is lacking. He states,

> What resulted in many cases was a 'disconnect' between the founders' imagination of family inclusion and the way the foundation itself was structured or, more frequently, the way it operated. Family members were invited to meetings, but not expected to say much. There was no demand that they prepare, or develop skills… They were accustomed to being excluded from any detailed knowledge about their parents' work… These second-generation offspring remember an invitation to participate, without a clear idea about what was actually being offered. To refuse would have been insulting and ungrateful, so they complied without asking too many questions.[121]

To overcome this typical disconnect, Marcovici,[122] Bentall,[123] Lamp,[124] and Daniell and McCullough[125] all advocate for the development of best practices in governance, including written strategic plans, family constitutions, and regular, formal family meetings to guide the family through the future decades where intergenerational shifts in

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[120] Michele R. Ballet, "The Experiences of Next Generation Siblings in Family Businesses: An Exploratory Study" (PhD diss., Rutgers, The State University of New Jersey, 2004), 2, ProQuest.

[121] Gersick, *Generations of Giving*, 61.

[122] Marcovici, The Destructive Power of Family Wealth, 124-132.

[123] Bentall, *Leaving a Legacy*, 319-321.

[124] Lamp, "The Positive Influence of Family Governance on the Family Business System," 225.

[125] Daniell and McCullough, *Family Wealth Management*, 375-391.

leadership will occur. Additionally, David Bentall recommends consensus decision-making with input by the entire family, a Quaker-inspired model that is often unfamiliar to entrepreneurial founders used to setting their own agendas.[126] He elucidates,

> It is my experience that consensus decision-making is the best way to create an environment where harmony in the family can be built and maintained. Deciding by consensus not only requires unity but also helps to maintain it. Consensus decision-making requires patience and careful listening, but these inevitably lead to better relations and better decisions.[127]

If the priority is to care for the family's health and empower next generations into leadership, formalizing interactions and giving everyone a voice will help bring clarity of purpose and shared commitment to the philanthropy mission. This collective planning can be eased by hiring third-party, outside experts who can facilitate the process.

Wisdom for Founders: Let Go

Regardless of the plan that is developed, when one confers a measure of responsibility to one's descendants, it will be both an emotionally exciting and a gut-wrenching moment. Movement away from founder control and learning to share ownership with one's descendants will require patience and surrender. Much like Jesus' self-surrender to human likeness in the Philippian hymn mentioned earlier,[128] transition involves pouring out oneself and submitting to new realities that may be unfamiliar.

In the selection of leadership for next generation philanthropy, founders may be limited to two or three candidates from within the family; the intimacy of family

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[126] Bentall, *Leaving a Legacy*, 311-312.

[127] Ibid., 201.

[128] Philippians 2:5-11.

relationships means one is deeply aware of their children's own various positive attributes and their glaring flaws. Entrepreneurial founders have amassed wealth through their ingenuity and skill, often facing invincible odds; next generation inheritors tend to lack resilience and are the comfortable beneficiaries of others' largesse.[129] Despite this, for Christian philanthropy to continue after death, one must trust God and release leadership to one's progeny.

This movement downward and of releasing one's grip of control is also a rhythm of life as one ages. William Bridges, known for his research in life cycles, describes this descent.

> The old need to grow into wholeness, to combine everything (negative as well as positive) into a ripened completeness… to understand the tremendous value of living through times when letting go is the only appropriate response to life… The final chapter of the work life may or may not involve salaried work, but it must return to society the fruits of those discoveries made during the third quarter of life.[130]

For the Christian founder who has created wealth through business leadership, this act of letting go may be an uncharted journey. And yet, the model of Jesus Christ's surrender is one that must inspire him at this point in his journey of faith. What value is one's faith, unless one surrenders to God's larger plan and purpose?

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[129] Thayer Cheatham Willis, *Navigating the Dark Side of Wealth: A Life Guide for Inheritors* (Portland, OR: Concord Press, 2003), 30.

[130] William Bridges, *Transitions: Making Sense Of Life's Changes* (Cambridge, MA: Da Capo Lifelong Books, 2004), 96-97.

Wisdom for Emerging Leaders: Step Up

For emerging leaders, wisdom to lead can be discovered through humbly acknowledging their incapacity, as they learn to lead despite weakness and inexperience, yet growing to embrace the role of a differentiated leader. A surprising second-generation differentiated leader is Francis Bernardone, later known as St. Francis of Assisi, who was "was born into comfort"[131] in the twelfth century. Though he could have been lulled into the lethargy of wealth, he proactively responded to God's leading to rebuild the church. Nathan Harter explains,

> Interpreting the voice [of God] to mean literally rebuilding the ruin where [Francis] was praying, his first thought was to raise money for the project. Having so little of his own, he cheated his father on a business transaction, justifying the theft as though it were commanded by God. His father did not see it that way and – probably exasperated with his aimless and profligate child – prosecuted.[132]

Harter continues,

> After all, the father had once paid a hefty ransom to recover his son from a neighboring city-state after a gruesome battle between partisans, and later he had outfitted Francis to go to war as a knight, only to have the young man give it all away to someone more in need…. The father had apparently reached the limits of his generosity.[133]

Cheating one's wealthy father, even if it is for the church, doesn't seem like a strategic move toward either sainthood or to successful family philanthropy. And yet despite this weak and flawed start, strangely, it was the beginning of Francis' living into his potential and indicated his passion for the church and the poor. He strips himself of

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[131] Nathan Harter, "Saint and Leader? The Example of St. Francis of Assisi", *Theology of Leadership Journal* 1, no. 1 (2018): 24. http://theologyofleadership.com/index.php/tlj/issue/view/v1i1/v1i1.

[132] Harter, "Saint and Leader?" 25.

[133] Harter, "Saint and Leader?" 25.

his father's clothing; naked and wholly differentiated, he begins to lead.[134] Harter identifies Francis' spontaneity as a weakness, but as he matured, his recklessness matured into a disciplined spontaneity that set him apart from his father. "Francis was both on the one hand disciplined and on the other hand spontaneous. This combination is in part what qualified him for leadership."[135] Today, St. Francis' eight-hundred-year legacy of inspired leadership through the Franciscan order has resulted in a movement of simplicity, generosity, missional expansion, and peace-making throughout the world.

Edwin Friedman's *A Failure of Nerve* interjects powerfully into this context for emerging leaders. He believes that potential leaders fail to lead when they fear stepping up with their own vision, and instead crumble under the pressure to conform to existing familial patterns. Friedman contends,

> Anyone who has ever been part of an imaginatively gridlocked relationship system knows that more learning will not, on its own, automatically change the way people see or think… In order to imagine the unimaginable, people must be able to separate themselves from the emotional processes that surround them before they can even begin to see (or hear) things differently.[136]

This separation from the family's emotional system is necessary to advance a relevant philanthropy for each generation of a family's leaders. Many families attempt to herd errant family members to toe the line. This requires what may be an immature consensus of uniformity, rather than encouraging differentiation and the celebration of a unique vision.[137] Without allowing room for adult descendants to mature towards self-

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[134] Alban Butler, The Lives of the Fathers, Martyrs, and Other Principal Saints, Vol. II (Dublin: R. Coyne, 1833), 570.

[135] Harter, "Saint and Leader?" 25.

[136] Friedman, A Failure of Nerve, 35.

[137] Ibid., 76.

differentiation, however, next generations will not be free to lead with integrity and authenticity, and the impact of family philanthropy will be hindered.

While the freedom to differentiate is essential for next generation family members, the nature of the philanthropy as being an expression of the entire family must also be held in tension. Respecting the significant efforts by the founders in creating this legacy is essential. Andrew Keyt cautions,

> The trap that some successors fall into is forgetting they are stewards of a legacy; they force change not in keeping with that legacy. An assault on the values of a predecessor is rarely successful. In general, successful emerging leaders create conditions in which the predecessor trusts that the successor has the best interests of both the family and business in mind."[138]

With a commitment to philanthropy succession and learning from wisdom for both founders and emerging leaders, new pathways for next generational leaders can be created.

Six Practices for Next Gen Leaders

Next gen leaders profiled in Barna Group's ongoing research on this emerging generation are unique contributors to future ministry contexts.[139] Modifying approaches in existing structures, including family foundations, is required to create space for their leadership; a failure to do this will marginalize their potential. Six practices for next generation leaders are introduced below; each of these strategies positively contributes to empowering this cohort to develop their own pathway forward for meaningful

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[138] Keyt, *Myths and Mortals,* 84.

[139] Barna Group, Making Space for Millennials: A Blueprint for Your Culture, Ministry, Leadership and Facilities (Ventura, CA: Barna Group, 2014), 7.

engagement through philanthropy. Creativity and risk-taking will be required by both founders and inheritors. This proposed next gen philanthropy model asserts that:

- Next generations learn best through experience;
- Collaboration with others is richer and more meaningful;
- Accompaniment through mentorship ensures support for the new leader;
- Focusing on one area of engagement creates a meaningful, strategic platform;
- A commitment to incremental change is worthwhile; and
- Adaptive leadership principles can be utilized.

Each of these six practices is explored further in the following sections.

Learning Experientially

Next generation-oriented philanthropy must leverage the concept of experiential learning if it will resonate with Millennial leaders. Rather than theoretical learning, or giving grants with no personal involvement, experiential learning implies more fully entering into charity life using grants as a doorway for involvement and ultimately being changed in the process. Practical, meaningful opportunities of volunteer engagement can be a hallmark of the new philanthropy. Goldseker and Moody's research in *Generation Impact* defines this approach:

> [F]or younger major donors, this hands-on approach is a primary way they define themselves, and they often point to it as a clear feature of their generation. 'It seems to me that in older generations, [they have] a very hands-off approach to funding, [who say:] 'We write checks, or we give money, but we are separate from the work that is happening.' But I want to be very much in relationship to the work that is happening. I don't want to be standing on the sidelines. I want to be part of that work for social change.'[140]

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[140] Goldseker and Moody, *Generation Impact*, 101-102.

As this generation learns by doing, it offers them a route to discovering their own purpose in life because they will experience their own shortfalls as a donor and the complexity of the charitable sector firsthand. Idealized visions of changing the world are confronted quickly by the harsh realities of working with charitable organizations with good intentions yet constrained by financial realities that prevent best practices from being realized.

Rather than being told how to give, next gen leaders are given a platform to learn themselves through their own experience in the non-profit sector. Goldseker and Moody continue,

> They want to 'plow their own trails,' even if those trails have been heavily traversed by the well-known family members who came before. 'You need to have that separation,' says one donor. 'It's a universal experience, being able to develop your own gravitas and responsibility, your own sense of accomplishment, and not necessarily within something that's being given to you or managed for you.'[141]

According to esteemed researcher-practitioners Margaret Wheatley and Deborah Frieze, this type of learning is characterized by both immersion and observation.[142] Next generations are invited to enter deeply into contexts of pain in the world to come alongside others to bring change, a journey that is consistent with that of Christ. Stepping outside one's comfort and learning to give on the margins is the pathway of differentiation for aspiring young philanthropists. Traditional attitudes toward wealth require this transition. Edgar Villanueva, indigenous member of the Lumbee tribe in North Carolina and philanthropy leader, insightfully offers this countercultural wisdom:

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[141] Goldseker and Moody, *Generation Impact*, 245.

[142] Margaret Wheatley and Deborah Frieze, *Walk Out Walk On: A Learning Journey Into Communities Daring to Live the Future Now* (San Francisco: Berrett-Koehler, 2011), xvi.

> Effectively moving money to where the hurt is worst – using money as medicine – requires the funder to have deep, authentic knowledge of the issues and communities that will be putting the funding to use. Deep authentic knowledge does not come from reading some stats, reports, or articles; it doesn't even come from a site visit to that community or interviewing someone from the affected community. It comes from living inside that community and experiencing that issue for oneself. Period.[143]

This journey moves the philanthropist in a full circle – from privileged place of buffered isolation to incarnational life together with those who benefit from philanthropic engagement. It is a humble echo of the journey of Jesus in the Philippian hymn.

Collaborating with Peers

While much family philanthropy is done in isolation, there is a growing recognition of the value of collaboration with peers in the process. This represents the second practice for next generation leaders and echoes the corporate pathway of being part of the church. Working with Millennials provides an excellent incubator for experimentation as a group that can expand to include several Christian families. Goldseker and Moody claim, "For next gen inheritors, particularly those who feel like they are suffocating under their family's traditional grantmaking approach, having access to innovative ideas through peer donor networks – and seeing what others have accomplished with those ideas – can be especially inspiring."[144]

Margaret Wheatley advocates for establishing such "communities of practice". She asserts that "We humans learn best when in relationship with others who share a

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[143] Edgar Villanueva, Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance (Oakland CA: Berrett-Koehler, 2018), 143.

[144] Goldseker and Moody, *Generation Impact*, 165.

common practice. We self-organize as communities with those who have skills and knowledge that are important to us."[145] The act of collaboration also multiplies the value of one's grantmaking as lessons learned, experiences shared, and grants given are value-added through the support and collective wisdom of one's peers.

Being Mentored

A third valuable practice is that of mentorship. Next generations must cultivate relationships with individuals outside the family's orbit who could become their mentors. Hughes et al. suggest that due to the power and success of their entrepreneurial parents, "the gravitational pull of the black hole" of strong personality and great success often negates the efforts of next generations to differentiate themselves outside of it. They propose qualified, non-family mentors who can offer constructive assistance through intentional relationship to articulate their own voices. [146]

Mentoring relationships have become a byword for next generation learning. While information, or technical learning, is available to Millennials through e-courses and YouTube how-to videos, the missing link is personal accompaniment on the journey. Mentoring can fulfill relational needs as well as provide wisdom from another's perspective.

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[145] Margaret Wheatley, *Finding Our Way: Leadership for an Uncertain Time* (San Francisco: Berrett-Koehler, 2007), 172.

[146] Hughes et al., *The Voice of the Rising Generation*, 116.

Focusing Philanthropy in Place

One of the temptations of philanthropy is to be awestruck by the opportunity to "change the world", a common byline for generous intervention. The result is often scattered, unfocused efforts in diverse parts of the world that produce isolated good acts but not substantive, lasting change within specific communities over a longer period. Joel Orosz names this as breadth, not depth.[147] To counter this lack of focus, embedding philanthropy in a local setting where the philanthropist is a long-term contributor can dramatically leverage one's influence and impact; the influence of foundations in the city of Pittsburgh provide a compelling example.[148] Jeremy Beer offers this counsel: "Instead of the grandiose projects and utopian visions too often pursued by Big Philanthropy – usually in league with big government – we need a smaller, humbler philanthropy, a philanthropy of accountability and human relationships, a philanthropy of place. Let us call this alternative vision *philanthrolocalism*."[149]

One stream in Christian philanthropy in the last decades has focused on evangelical urges to "take the Gospel to every creature" with its emphasis on lost people groups that need a Savior. The so-called "10/40 Window" features prominently in such activity.[150] Though well-intentioned, this spiritualized approach assumes individual

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[147] Joel J. Orosz, Effective Foundation Management: 14 Challenges of Philanthropic Leadership – and How to Outfox Them (Lanham, MD: AltaMira, 2007), 93.

[148] Ronald A. Heifetz, John V. Kania, and Mark R. Kramer, "Leading Boldly," *Stanford Social Innovation Review* (Winter 2004): 22, ProQuest.

[149] Jeremy Beer, "Satan Was the First Philanthropist," in *Localism in the Mass Age: A Front Porch Republic Manifesto*, eds. Mark T. Mitchell and Jason Peters (Eugene, OR: Wipf and Stock, 2018), 225.

[150] Joshua Project Website, "What is the 10/40 Window?" accessed November 29, 2019, https://joshuaproject.net/resources/articles/10_40_window.

conversion is the most pressing community issue. Unless these philanthropic interventions are rooted in a specific geography over time, evangelistic interventions in African and Asian cultures by Westerners become scattered and fail to pay attention to those communities' long-term flourishing. In contrast, post-modern Christians will recognize they do not operate from a place of power as colonizers, but from an experience of exile. They will be drawn instead to Jeremiah's call to: "Build houses and live in them; plant gardens and eat what they produce… Seek the welfare of the city where I have sent you into exile, and pray to the Lord on its behalf, for in its welfare you will find your welfare."[151] Philanthropy done by people of faith in such an environment will seek organic, participatory expressions creating meaningful life and minimizing barriers with others. Local, embedded philanthropy, done in community where one is known by one's neighbors, offers a vastly different expression for next generations who engage with the world.

Embracing Incremental Change

Philanthropy done by next generations within existing family foundation systems can be done in experimental ways that allow descendants a measure of creativity. While idealistic emerging leaders can be awarded room to experiment, efforts should be restrained by the discipline of the "tempered radical".[152] Interventions start small, but strategically. According to Debra Meyerson, such projects are doable, create a sense of

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[151] Jeremiah 29:5-7, NRSV.

[152] Debra E. Meyerson, "The Tempered RADICALs," *Stanford Social Innovation Review* (Fall 2004): 16, ProQuest.

hope and self-confidence, lead to heightened ambition and more effort, minimize anxiety and personal risk, do not bump against the majority system, and express and sustain different values and identities.[153] Led by next generation leaders, these are experimental initiatives outside the status quo where emerging philanthropists learn through trial and error.

Small is a relative term depending on the size of the foundation. When empowering next generation inheritors for eventual leadership, a meaningful segment of the foundation's annual disbursement budget, perhaps 10%, can be allocated for grants funded by the next generation.[154] As incremental progress is made and trust is built within the family, further investment will allow next gen leaders to assume greater leadership rooted in actual experience.

Adjusting through Adaptive Leadership

Next generations, with their commitment to strategy, are not likely to focus on technical problems, but adaptive approaches to complicated social issues.[155] This style of leadership was well-defined by the pioneer in conceptualizing adaptive strategy, Ronald Heifitz, who asserts that:

> Adaptive leadership is an iterative process involving three key activities: (1) observing events and patterns around you; (2) interpreting what you are observing (developing multiple hypotheses about what is really going on); and (3) designing interventions based on the observations and interpretations to address the adaptive challenge you have identified.[156]

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[153] Meyerson, "The Tempered RADICALs," 17-18.

[154] Goldberg, et al., *Creating Change Through Family Philanthropy*, 132.

[155] Goldberg, et al., *Creating Change through Family Philanthropy*, 57.

[156] Ronald A. Heifetz, et al., The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World (Cambridge MA: Harvard Business Review Press, 2009), 34, ProQuest.

This style works best for the embedded philanthropy proposed for next gen leaders who see technical solutions as quick-fix band-aids, and adaptive solutions as offering the hope of restructuring the problem to better address social ills over a longer period (see Table 1.1).

Table 1: Technical Versus Adaptive Problems[157]

Technical Problems	**Adaptive Problems**
Characteristics • Problem is well defined. • Answer is known. • Implementation is clear. • Solution can be imposed by a single organization.	Characteristics • Challenge is complex. • Answers are not known. • Implementation requires learning. • No single entity has authority to impose solution on other stakeholders.
Examples • Funding scholarships. • Building hospitals. • Installing inventory controls for a food bank. • Developing a malaria vaccine.	Examples • Reforming public education. • Providing affordable health care. • Increasing organizational effectiveness. • Achieving 80 percent vaccination rates.

Empowering the next generation to improvise and learn through direct granting and engagement opportunities with nonprofit partners will require a broader perspective that adaptive leadership enables. This generation is navigating monumental changes that impact faith, society, and their own family philanthropy. Rather than assuming next generations need to fit within existing family philanthropy frameworks, experimental new approaches will use this adaptive approach. Heifitz advises, "To practice adaptive leadership, you have to help people navigate through a period of disturbance as they sift through what is essential and what is expendable, and as they experiment with solutions

[157] Leslie R. Crutchfield, John V. Kania, and Mark R. Kramer, *Do More Than Give: The Six Practices of Donors Who Change the World* (San Francisco: Jossey-Bass, 2011), 151.

to the adaptive challenges at hand…. You need to live into the disequilibrium."[158] This new generation lives within the chaos of these changes and will be the ones who will most successfully discover new solutions for faith-based philanthropy in its midst.

Conclusion

The Gathering is the leading evangelical philanthropic network in the United States. Over four decades, its founder, Fred Smith, presided over the annual reunion of several hundred high net worth Christian families who gathered to consider best approaches to stewarding their wealth in the name of Christ. In 2019 he relinquished leadership to Josh Kwan, an emerging leader over a generation younger. In doing so, Smith offers a courageous template to consider for philanthropy succession.[159]

Smith's introduction of Kwan to me by email is revealing. He wrote, "I've told Josh and the Board that Josh is not my successor. I would rather he think of himself as the new founder. I want him to have as much latitude as he desires and not feel he is tied to anything I did in my time. It's an inheritance with no donor intent!"[160] This generous, selfless introduction frees Kwan to lead well and consider his work to be that of creating, not continuing, new prototypes for philanthropic intervention. Rather than being constrained by the past or operating with diminished agency under the shadow of a prominent founder, Kwan becomes a new founder, free to lead from his own generational

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[158] Heifetz, et al, The Practice of Adaptive Leadership, 31.

[159] Fred Smith, "I Stand Relieved," The Gathering Blog, November 1, 2018, https://thegathering.com/i-stand-relieved/.

[160] Fred Smith, e-mail message to author, June 3, 2019.

perspective and commitment to Christ. This same generous trust can be imitated by parents to their offspring within family foundations.

Gersick considers this transition a necessary shift that can occur for all leaders. “Succession raises both hope and anxiety: hope that new solutions can be found, that youthful energy will revitalize old routines, that the future will be better; and anxiety that there are no new solutions, that the new leaders are not up to the task, that the dangerous and untried new directions will be less successful than the techniques of the past.”[161]

Setting the stage for the success of these new founders, one must carefully position one’s philanthropy to give space for their leadership. This comes when the founder lets go, and when the successor steps up. It occurs when next generations are free to learn through their own experience, to collaborate with their peers, to accept the accountability of mentorship, to develop their own focus, to embrace incremental change, and to constantly adjust through adaptive leadership principles. A practical learning experience that can provide these skills and necessary accountability is outlined in an artifact that is developed and explained in the final sections of this dissertation.

Despite the inherent challenges of passing the baton to next generations, generational transitions provide an opportunity to cultivate faith in God and boldly trust that he will guide one’s descendants in the responsibilities they inherit. Intentional effort in planning for this transition must occur, and careful mentoring of next generations to onboard them into the privilege of giving well will play a part. The rewards are immense: knowing that one has created a spiritual legacy that will continue long after death yet trusting it to God for safekeeping. Next generations will be positioned to lead with

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[161] Gersick, Generations of Giving, 234.

philanthropic engagement that is relevant for their world, as productive interventions modelled after Jesus' selfless giving will continue far into the future.

SECTION 4:
ARTIFACT DESCRIPTION

Founders of philanthropic organizations struggle with how to best leverage their privilege as they plan the legacy that they are bequeathing successive generations. Descendants of the founders are assumed to be the best option for carrying philanthropic responsibilities forward. Yet planned and intentional opportunities to onboard the Millennial and Gen Z generations are rare within family philanthropy. Formational experiences to shape one's leadership potential of this generation are necessary. In response, based on the research and interviews with philanthropic families cited in this document, I have created the School of St. Lawrence, a philanthropy incubator to facilitate the acquisition of wisdom and grassroots experience in Christian philanthropy.

For Christian philanthropic families, St. Lawrence Deacon of Rome (?-258 AD) provides a compelling model.[162] Entrusted with the wealth of the church during a period of intense persecution against the nascent church, Lawrence freely distributed the church's riches to the destitute in Rome. When pursued by Imperial Roman soldiers to turn over the church's wealth, he led them to the poor, indicating that they themselves were the wealth of the church. The Romans, naturally, were enraged. Imitating Christ's kenotic journey of self-giving love, Lawrence surrendered himself to be grilled over the open flame to his death, leaving a vibrant witness of early Christian philanthropy that endures today.

[162] Butler, The Lives of the Fathers, Martyrs, and Other Principal Saints, Vol. II, 219-222.

The School of St. Lawrence will be a nine-month period of incubation in philanthropy. The experience matches eight charities with eight next generation philanthropists who will gather in two weekend retreats to begin and end the experience. Combined with the initial retreat will be a public event where next generation philanthropists will award a $10,000 CAD grant to a charity for a project of their choice. The project will be located within a specific community context that the funder will be encouraged to know. In the intervening months, philanthropy participants will reflect on their grantmaking experience with their cohort: how it impacted beneficiaries, charities, and themselves. They will be guided in this process through monthly pre-recorded video interviews with experts, a monthly video conference call with guided questions on specific topics, and additional resources such as pertinent books and articles. They will also be encouraged to volunteer with or increase exposure to their charity's activity according to their availability and experience. This could include insight trips to the field, grassroots volunteering, assisting with a fundraising campaign, meeting with potential donors, and serving on charity committees or boards. I will also personally visit each participant to check in with them during the period.

The School of St. Lawrence, then, will demonstrate through intentional mentoring, practical engagement, and being gathered as a community of practice, the impact and longevity of self-surrender in philanthropy. It embodies an upside-down perspective on the kingdom of God in our world: that financial wealth is secondary to spiritual and relational wealth. Rather than isolating oneself in comfort from the ills of the world, this philanthropy incubator will lead next generations to experience life on the margins, and to consider the transformational role younger philanthropists can choose as their family wealth is leveraged for the benefit of another.

SECTION 5:

ARTIFACT SPECIFICATION

Goals and Strategies

The School of St. Lawrence will be a nine-month experiential philanthropy incubator. Next generation philanthropists will purposely reflect together as a community of practice on the potential impact of who they are as inheritors and what opportunities for stewardship lie before them because of their family background and access to wealth. Embedded throughout the process through retreats, monthly video meetings, and online resources will be a commitment to cultivating a deepening awareness of what makes Christian philanthropy distinctive from secular philanthropy. Consistent with the yearning of younger leaders to make a difference today, actual financial grants from each member of the cohort will be made to qualified charitable organizations following a due diligence process. This opportunity is more than a financial transaction; ample space will be provided to carefully journey together with charity leaders in learning best practices for philanthropy and non-profit management. As the Lead Mentor, I will intentionally journey together with participants to assist them in integrating the experience and to influence future philanthropic giving and engagement.

While the first cohort is scheduled to begin this new program in September 2020, a prototype of this artifact was beta-tested with a test group who contributed to the Spark Initiative in 2018-2019. The Spark Initiative, a program managed by the Canadian Baptists of Ontario and Quebec, endeavored to fund millennial innovators in launching social enterprises; my involvement was in recruiting younger donors from Canadian

Christian family foundations to fund the initiative. They were also invited to learn alongside this group during retreats on an ad hoc basis; this involvement was not an intentional, designed process. While the program overall conferred benefits on the giving group, there was a perceived gap for the younger philanthropists who desired a more direct and customized learning opportunity that focused on their need to learn how to give well. The School of St. Lawrence will address these gaps with a program designed especially for them.

The success of the School of St. Lawrence will be determined through successful recruitment and deployment of next generation philanthropists in giving well and journeying alongside Christian charities. Evaluation and feedback of the experience by participants in the first year will contribute to improving the program in future years. Long-term success will be evidenced as participants continue giving and volunteering in the future. A key strategy of this model will encourage next generation givers to learn that leading from the comfortable center of power, influence, and wealth is not effective in Christian philanthropy. Rather, humbly moving to the margins through volunteering and contributing where need is greatest, one can discover one's own vulnerability and need for mutuality in relationship.

This initiative is designed to form a key program of Stronger Philanthropy, my firm that assists major donors to give well through strategic interventions and careful stewardship. Graduates of the program will be encouraged to utilize Stronger Philanthropy's core platform to facilitate their ongoing philanthropy by their family foundations in successive years. My ongoing relational connection with the cohort following the experience will ensure this dynamic continues.

Audience

The primary audience for the School of St. Lawrence are younger next generation members of Canadian Christian families that maintain family foundations or distribute grants from corporate entities or personal wealth, and who anticipate a lifetime of philanthropic giving. These members are generally between twenty and thirty-five years old. This generation seeks a differentiated experience from their parents and grandparents that empowers them to learn giving strategies and develop relationships with charity leaders to impact society in practical ways at the grassroots.

David P. King, professor at the Indiana University Lilly Family School of Philanthropy, reflects how philanthropy is approached by this generation:

> Guilt rarely works with millennials, but they are eager to engage with a cause they believe in and where they feel they can make a difference. Millennials prefer issues to institutions, people over organizations. They want to test the waters—take it slow, volunteer first, often alongside a peer. They investigate your organization's mission and vision. Not only do they *value*, but they actively *insist* upon authenticity, transparency, and community. They do not want to sit idly by and make a donation. For many, giving without significant, hands-on engagement feels to them like a hollow investment with little assurance of impact. They want to develop close relationships with the organizations or causes they support; they want to listen and offer their own professional or personal talents, all in order to solve problems together with those whom they support. Millennials learn about causes and strategies from their social networks and enjoy sharing their own knowledge and experiences with their peers. They believe that collaborating with peers makes them all better donors, and extends their impact. Put simply, they want to give their full range of their assets—their treasure, of course, but also their time, their talents, and even their ties, encouraging others to give their own time, talent, treasure, and ties.[163]

The School of St. Lawrence addresses these very issues and provides a community of practice through which philanthropic formation can develop.

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[163] David P. King, "Millennials, Faith and Philanthropy: Who Will be Transformed?" *Bridge/Work* 1, no. 1 (2016): 7, http://scholar.valpo.edu/ilasbw/vol1/iss1/2.

There are two secondary audiences. The first are the founders, or first-generation wealth creators, often Boomers who have established foundations or philanthropy strategies that anticipate giving in perpetuity by their descendants. As creators of these legacy opportunities, this audience is eager to see next generations of their families develop skills, passion, and wisdom in giving that avoid the potholes that regularly trip up givers.[164] The other secondary audience are the charities themselves. Fundraising among major donors by charities relies on relational strategies that this opportunity provides. Most charities are recognizing they need to change fundraising strategies with Millennials and Gen Z and are seeking practical ways to do so.[165] Positive financial and relational impact for multi-year investment in fulfilling the charity's mission will be the result of working intentionally with this new generations.

Artifact Scope and Content

The School of St. Lawrence will be officially launched in September 2020 following the recruitment of participants in Spring and Summer 2020. The experience will be bookended by two weekend retreats in September 2020 in downtown Toronto and May 2021 in rural St. Stephen, New Brunswick. The geographic location of the two retreats mimics the Christian kenotic journey from the center to the margins of power and influence. Eight next generation participants will attend the retreats alongside a representative from each of their eight selected charities. Ideally, these charity

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[164] Williams and Preisser, *Philanthropy, Heirs & Values,* 97-98.

[165] Justin Wheeler, "How Millennials are Changing Philanthropy," *Forbes,* August 15, 2018, accessed November 27, 2019, https://www.forbes.com/sites/theyec/2018/08/15/how-millennials-are-changing-philanthropy/#2c5afb9e7c68.

representatives will be peers – rather than giving money, they give of themselves to charity life as fundraisers or program directors. Participants will fund grants from a selection of charity project applications received prior to the start date that will provide them with an active and concrete project with which to journey over the course of the year. The projects themselves will be rooted within a specific local context, whether the philanthropist's hometown or an international community in need. Between the retreats, next generation participants will meet as a peer group in seven monthly one-hour video calls to discuss lessons learned throughout their involvement. Short video interviews with experts in various aspects of family philanthropy will be uploaded and available for viewing by the cohort prior to each group conference call. These will coincide with the themes for the monthly conversation. Additional readings, videos, podcasts, interviews with experts, and other resources pertinent to the themes explored will also be made available. The resulting cohort will become a community of practice.

Each recipient charity will develop a project that corresponds to an area for fulfillment of their mission. These will be small projects valued at approximately $10,000 with the expectation their goals will be achieved within the timeframe of the school. Along with the grant from the next gen philanthropist, an invitation will be presented to the individual for practical engagement in charity life: volunteering, insight trip, participation on the board or in a committee, or some other concrete means to expand understanding and increase passion for the charitable cause. Experiences will be integrated through conferencing with the Lead Mentor of the program.

The group will utilize Google Classroom to manage and deliver content, and it will be supplemented with a private, dedicated Facebook group for informal conversation. Zoom video technology will be used for monthly meetings. Participants will need a standard computer and/or smartphone with video capability to access materials and meetings. Finally, Foundant's GLM cloud-based software will be utilized by participants to provide grant application processing and management under a license owned by my firm.

Budget

The annual operations budget of the School of St. Lawrence is $100,000 CAD and will be managed by Stronger Philanthropy staff. Participating family foundations will be charged tuition of $6,250 CAD, and participating charities will also be charged a similar amount. Outside the operations budget, eight grants of $10,000 CAD each[166] will be awarded to eight charitable projects as selected by the participants. A detailed budget for the program is provided in Appendix B.

Expenses of the program are directed toward retreats and personnel costs. This includes transportation, lodging, and meals for participants, and honoraria for speakers, at the two retreats in Toronto and St. Stephen. Program management involving three staff of Stronger Philanthropy is also a significant expense. Ancillary expenses for resources (books, supplies) and taxes payable complete the budget.

Promotion

Recruiting participants is the main promotional effort needed for this artifact. As charities have existing relationships with their major donors, outreach to selected charity

[166] This amount may be increased depending on the ability or interest of the granting foundation.

leaders will be the main strategy to recruit next generation inheritors. The benefits of this program for the charity are significant: not only will the charity receive program funding, a younger staff person (typically selected from their program or development departments) will benefit from an immersive professional development experience with their millennial donors. This is a high priority for Canadian charities who are seeking ways to cultivate relationships with the next generations to ensure healthy program continuity. Since only eight individuals are required for the first cohort, I will reach out to charity leaders directly through meetings or phone calls to outline the opportunity and invite participation. In early conversations with charity leaders, reception to this idea is overwhelmingly positive.

Announcements regarding the program and updates during the school will be made on the Stronger Philanthropy blog, in its monthly e-newsletter to over 700 subscribers, and through existing social media accounts. As well, participants will have the opportunity to blog their own reflections on their experience in guest posts during the period.

Standards of Publication

Similar leadership development learning cohorts operate through other charitable and educational entities. The School of St. Lawrence is not designed for academic credit, but rather for experiential learning by people using a less rigorous format. Margaret Wheatley offers a fourfold approach to such communities of practice to name, connect, nourish, and illuminate the community;[167] each of these qualities is present in the School

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[167] Wheatley, *Finding Our Way*, 173-175.

of St. Lawrence. In common with experiential learning cohorts, a diversity of learning approaches, both theoretical and practical, are utilized: reading, discussing, practicing, listening, mentoring, and giving. Learning objectives for retreats, video interviews, and online meetings are developed for each segment and will be used to assess progress and success of the program.

Action Plan

Various elements are required to ensure the School of St. Lawrence is operationalized in a timely fashion and to meet its objectives. These include the development of curriculum for both the retreats and the monthly meetings, and the recruitment of people: participants, applicant charities and their representatives, and qualified experts to speak on various topics. The content to be covered in retreats, video interviews, and monthly video conferences is detailed in Appendix A. Funding for the initiative undergirds activity, and will be sourced from interested foundations, charities, and participants. A Millennial third-generation foundation member has been hired to coordinate the logistics and manage the program, a staff member will oversee bookkeeping and administration, while I will direct program delivery and provide executive leadership.

Competency and grassroots experience in both non-profit management and multigenerational philanthropy is core to providing a successful learning experience to participants. My ten years in non-profit service delivery in overseas ministry provides a window into the many challenges that charities encounter at the grassroots. This was succeeded by nineteen years in leading a family foundation and various grantmaking programs that served multiple family foundations. Between 2000-2019, I provided leadership for over $38 million in grants to over 800 Canadian charities, with the process undergirded by a disciplined process of due diligence and program evaluation.[168] The breadth and depth of this experience is documented in my first book, *Love Giving Well: The Pilgrimage of Philanthropy*,[169] and in a coffee table book documenting the history of a foundation's engagement, *Bridgeway at 35: A Legacy of Faith and Philanthropy*.[170]

The following timeline outlines expectations regarding the development and implementation of the first year of operations for the School of St. Lawrence:

Table 2: School of St. Lawrence Timeline

Dates	**Activity**
December 2019	Approve 2020 budget for School of St. Lawrence
January - February 2020	Finalize curriculum for retreats and monthly meetings with participants; book speakers and venues
January - April 2020	Conduct video interviews with qualified experts and produce videos for online viewing
January - April 2020	Develop two-stage grant application process for charities (Letter of Inquiry and Full Application stages)
April - May 2020	Recruitment of next generation participants and charities; confirm retreat and travel dates with participants
June 1-26, 2020	LOIs[171] for projects received from charities; LOIs advance to Full Application stage with feedback from staff

[168] Stronger Philanthropy Inc., "Historical Grants 2000-2019," internal company records, accessed November 2, 2019.

[169] Mark Petersen, *Love Giving Well*: *The Pilgrimage of Philanthropy* (Eugene, OR: Wipf and Stock, 2017).

[170] Bridgeway Foundation, *Bridgeway at 35: A Legacy of Faith and Philanthropy* (Toronto: Graf-Martin, 2015).

[171] Letters of Inquiry (LOIs) are the first stage of the grant application process, and are followed by a full application.

Dates	Activity
July 31, 2020	Full Applications for projects received from charities
August 1-28, 2020	Due diligence of charity's application (Dashboard of Charity Health, Narrative Assessment) completed and sent to participants
September 11-13, 2020	Toronto Retreat
October 5, 2020	Zoom meeting #1
November 2, 2020	Zoom meeting #2
December 7, 2020	Zoom meeting #3
January 4, 2021	Zoom meeting #4
February 1, 2021	Zoom meeting #5
March 1, 2021	Zoom meeting #6
April 5, 2021	Zoom meeting #7
May 7-9, 2021	St. Stephen NB retreat
May 2021	Evaluation of program, integration of lessons learned, and recruitment of cohort 2
June 1, 2021	Launch of second round of School of St. Lawrence

The School of St. Lawrence is an innovative philanthropy incubator, designed to patiently walk alongside the next generation as the group learns together through practicing the art of philanthropy. Vibrant expressions of philanthropic engagement will be birthed through this project, unique to each of the participants, as each one discovers their role and seeks the betterment of a community through giving well.

SECTION 6:

POSTSCRIPT

The focus of research and writing of this dissertation has emerged from the practical ministry issues experienced as a next generation philanthropy practitioner. Rather than just being a theoretical dilemma, the issues raised in this research were lived out, sometimes painfully, while attempting to faithfully respond to God's call in the place I found myself. While many see the exhilarating potential of directing large sums of funding toward innovative and strategic ministry projects, I was concerned with the often-hidden challenges embedded within the structure and systems of family philanthropy. The healthy longevity of these philanthropic systems, their impact on families over time, and the ability of such systems to continue faithful service in the name of Christ were all drivers in my research.

Another area that emerged was the question 'What makes Christian family philanthropy distinctive from secular philanthropic expressions?' While there is considerable overlap, the underlying inspiration and example of Christ in his *kenosis*, like a self-giving, endless waterfall of grace, must impact how we do Christian philanthropy in our world. The humble trajectory toward the margins, erasing barriers between us and them, and selfless giving without seeking a name for oneself must be hallmarks of Christian generosity.

This dissertation has prioritized Christian philanthropy offered by families of wealth and is narrow in its focus on inheritors who are giving out of their family's endowment. Further research on next generation giving will be a broader topic for ongoing study. A significant divergence is occurring as the large Millennial generation is just entering the decades of its maximum earning potential, and how this generation chooses to give when it has earned the wealth itself.

Another emerging theme is a not-so-subtle disparagement of a perceived broken Western capitalism, with anger and disillusionment by Millennials. As I write, the astonishing rise of neo-Marxist political theories espoused by leading influencers Elizabeth Warren and Bernie Sanders in the US, and Jeremy Corbyn in the UK, demonstrate that current capitalism lacks the salty savor of a vibrant Christian faith for the benefit of society, and sadly leads only to amassing wealth for selfish luxury or egoistic self-promotion. Christian philanthropy could lead the way in pointing to a gentler and kinder solidarity within Western societies.

Undertaking this research presented many opportunities for me to reflect on the way family philanthropy is commonly undertaken, and how one can continue to improve one's stewardship. Developing the School of St. Lawrence as the artifact is one response to this reflection, and it will become a small program my firm will offer annually. The time and thought given to the topic, however, allowed me to reposition the way my firm serves Christian family foundations. During my course of study, I hired my son, Nate Petersen, as Program Director to manage the activities of the School of St. Lawrence; his enthusiastic contribution as a Millennial are already shaping program ethos and delivery for the entire firm. One small example is that thanks to his insights, he encouraged the replacement of our website's main image from a happy, white, possibly entitled, multigenerational family frolicking in the sand at the beach to a pair of worn, dirty hands cradling a small plant growing in the earth. The tagline was also shifted to "Growing a

Legacy of Generosity".[172] Plans are in place to roll out new ways of serving families to enable greater participation and ownership by younger members.

My hope is that this research, and the practical application of my created artifact, the School of St. Lawrence, may introduce a new way forward for generous Christian families to ensure their legacy grows into the future. Coming alongside those hidden and suffering at the margins of our world is the pathway toward abundant life modelled by Jesus Christ. Next generations of leaders in Christian family philanthropy can boldly move into this sacrificial space.

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[172] Stronger Philanthropy Website, "Home Page," accessed December 9, 2019, http://www.strongerphilanthropy.ca.

APPENDIX A:

SCHOOL OF ST. LAWRENCE

Overview

Mission

The School of St. Lawrence is a philanthropy incubator for young, spiritually motivated major givers as they undertake sustainable projects to benefit local communities.

Vision

The School of St. Lawrence aspires to mentor next gen philanthropists in moving from passivity at the comfortable center to engagement at the ragged margins where Christian philanthropy finds its natural home.

Key Underlying Themes

Various themes undergird the School of St. Lawrence that will guide participants in their learning. Participants will move along the following trajectories:

- From isolated self-sufficiency and entitlement to interdependent community;
- From emotional, reactive one-way giving to thoughtful, strategic collaboration and mutuality in relationship;

- From generational division and family misunderstanding to empowered next gen leadership;
- From giving as obligation to eager participation with joy; and
- From giving without context for one's spirituality to one that is undergirded by and empowered by an integral, personal faith in Christ and his example.

Approach

The School of St. Lawrence is a community of practice that will offer participants various opportunities to learn and experience Christian philanthropy at work, and through peer learning, to integrate what is learned into their own ongoing philanthropy. Eight next gen philanthropists, ideally second- or third-generation descendants of Christian family foundations, will each select a partner charity with which to undertake the experience. The charity will receive a grant from the philanthropist, and in return will be invited to experience and contribute to their charity work firsthand within a specific community (in Canada or abroad) during the time frame of the school.

Two retreats will bookend the year. In the intervening months, online video classes will allow for participants to learn from each other and the lead mentor in a structured process of conversation that reflects on actual experience in engaging in philanthropy with each participant's selected charity. Below is an overview of content to be developed for the school.

Toronto Retreat: September 11-13, 2020

Goal

To introduce participants to the possibility that Christian philanthropy is engaged, humbling, and experiential as we follow Christ in self-giving love to be a part of the changes needed in our world.

Summary of Retreat

Sessions will cover topics such as family philanthropy contexts and processes and be practically highlighted by hearing pitches from charity leaders inviting volunteer engagement and financial participation. Charities will accept a donation from each participant at a public event that features the work being done and which highlights the future engagement of the donor.

Agenda

Friday, September 11, 2020

Opening reception and introductions

The retreat opens with an overview of the purpose of this program, an outline of curriculum, and personal introductions.

Session 1: Building trust

Christian philanthropy begins with trusting relationships among stakeholders, including philanthropists and charity leaders alike. Participants will have an opportunity to listen to each other's stories as the group reflects on the role of generosity and the meaning of philanthropy, from the Greek *phileo* and *anthropos*: a love for humanity.

Saturday, September 12, 2020

Morning contemplation

The early Christian martyr, St Lawrence, is a patron saint for philanthropy. The group will reflect on his life and legacy, and how it can inspire one's own philanthropy.

Session 2: What is Christian philanthropy and how is it unique?

Understanding the historical and theological background of Christian philanthropy allows for greater appreciation for its potential to shape Christian mission today. Themes such as engagement, reinterpreting wealth and poverty, mutuality, the temptations of pride and control, and a willingness to be personally transformed are considered.

Session 3: Engaging with philanthropic opportunities

Models for engaging with charitable mission are considered in this session, from transactional models to those with greater involvement leading to transformation.

Special consideration is given to donor intent and the legal frameworks underpinning engagement.

Session 4: Healthy charity relationships

This session considers the characteristics of healthy relationships with charities and explores indicators for health in non-profit organizations. The role of leadership, organizational mission, financial health, fundraising, and accountability in charities are considered. The existing power imbalance between donors and charities is also addressed.

Session 5: Creating a shared understanding of partnership

Documenting and communicating expectations for engagement will be the focus of this session with participants defining the terms of their partnership and agreeing on specific opportunities for involvement over the course of the following months.

Launch event for School of St. Lawrence

This public event will gather people interested in charity impact and on philanthropy's role in it. The evening will have a different spin. Charity projects will be featured by philanthropy participants who will explain their decision to be involved. Rather than passive, entitled onlookers, next gen givers are shown to be engaged and committed. A response will be offered by charity leaders, and the public will also be invited to give to these charitable projects.

Sunday, September 13, 2020

Morning contemplation

The focus of this contemplation is on the woman with the alabaster jar.[173] This woman sacrificed financially out of her love for Jesus, and broke religious taboos and cultural norms in giving well.

Session 6: Knowing how one can best contribute

Participants will be encouraged to explore their own personality and ways in which they can best contribute. The session will introduce the Birkman Method;[174] participants will work with a qualified assessor to ascertain their unique contribution.

Session 7: Orientation to the months ahead

A final session provides space to review the retreat's goals, and to guide participants toward maximum benefit for the months ahead.

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[173] Mark 14:1-11.

[174] The Birkman Method, a leading series of self-assessment tools, is utilized in executive coaching and leadership development, and allows individuals to understand their behavior under normal circumstances and during periods of need or stress. See https://birkman.com/.

Online Content Between Retreats

Approach

Programming between the two retreats will be delivered through Zoom, an online video meeting software, through pre-recorded video interviews by Mark Petersen with qualified experts, and through individual Zoom meetings or personal visits arranged with each participant to address specific concerns.

Each programmatic theme will be addressed twice in two divergent ways: first, in pre-recorded interviews with a qualified expert that participants watch at their leisure, and subsequently, through guided conversation in the group meeting. The pre-recorded videos will be uploaded and available as of the indicated date, but participants will have three weeks until their next meeting date to view the interview. This material, plus additional questions raised during the meeting, will provide the content for peer learning during group sessions.

Summary of Online Content

Table 3: School of St. Lawrence Summary of Online Content[175]

Date	**Topic**	**Delivery of Content**
September 14, 2020	Talking About Money	Video interview with Frances Wilson, Executive Director, Acts of Grace Foundation, Burlington, Ontario
October 5, 2020	Talking About Money	Zoom meeting #1

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[175] As is mentioned in the Action Plan, I will be reaching out for interviews with experts in early 2021. The list of expert participants in this document is, at this point, not yet confirmed.

October 12, 2020	Working Together	Video interview with Doris Olafsen, Co-Founder, Joyful Living Joyful Giving Foundation, Langley, British Columbia, and Vice-President, Philanthropy, Opportunity International Canada, Toronto, Ontario
November 2, 2020	Working Together	Zoom meeting #2
November 9, 2020	Navigating Family Dynamics	Video interview with Rod Wilson, Past President, Regent College, Vancouver, British Columbia
December 7, 2020	Navigating Family Dynamics	Zoom meeting #3
December 14, 2020	Power and Privilege	Video interview with Brian Bakke, Americas Director, Mustard Seed Foundation, Washington, D.C.
January 4, 2021	Power and Privilege	Zoom meeting #4
January 11, 2021	Reinterpreting Failure	Video interview with Greg Pennoyer, Executive Director, Image, Seattle, Washington
February 1, 2021	Reinterpreting Failure	Zoom meeting #5
February 8, 2021	Tempered Radicalism	Video interview: Josh Kwan, President, The Gathering, Tyler, Texas
March 1, 2021	Tempered Radicalism	Zoom meeting #6
March 8, 2021	Personal Transformation	Video interview with Chris Wignall, Executive Director, Catalyst Foundation, Oakville, Ontario
April 5, 2021	Personal Transformation	Zoom meeting #7
April 12, 2021	Lessons Learned and Preparing for the Retreat	Video discussion with Mark and Nate Petersen to summarize what has been learned and how to best prepare for the final retreat.

Further detail regarding these seven topics and questions to guide the conversation follow below. Each topic will also have a short article or chapter for further reading if desired.

Topic 1: Talking About Money

Goal: To explore how thoughtful communication both inside and outside the family will lead to a more rewarding philanthropy.

Rationale: Most people find it hard to talk about money. This can be especially true in families of wealth, both within the family and in public. Learning ways to approach this subject and discuss one's family philanthropy is needed for greater transparency and to empower next generation leaders.

Interview Questions for Video:

- How did you first learn about your family's philanthropy?
- How does your family talk about the wealth within the foundation?
- Has your family experienced any bumps along the way in learning to communicate effectively about your family philanthropy? If so, what happened?
- Have you learned any strategies for communicating about your philanthropy with the general public?
- How does your identity as a Christian influence how you communicate about your philanthropy?

Meeting Questions:

- How do you and your family communicate about your family philanthropy?
- What are the risks of communicating informally?
- Have any steps been taken in your family to create more formal ways of communicating? What are they?

Action Step: Consider one thing you can do to improve family communication around your philanthropy.

Further Reading: Participants can refer to Chapter Eight, "Improve Communication", in Goldberg's work on next gen involvement in family philanthropy.[176]

Topic 2: Working Together

Goal: To explore how philanthropists and grantees can develop mutually beneficial relationships that serve the interests of the shared cause.

Rationale: When philanthropy is reduced to financial transactions only, there is a missed opportunity for greater change. Contributing with more than one's wallet and finding ways of working together is the first step to personal transformation.

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[176] Goldberg, et al. Creating Change through Family Philanthropy, 45-50.

Interview questions for video:

- How have you seen givers transformed through your work of introducing wealthy Canadians to microfinance in places like Colombia and Ghana?
- What barriers to involvement exist for people of wealth?
- What are some of the ways that millennial and Gen Z givers can become involved with their charity of choice?
- How does your understanding of the Gospel challenge how philanthropy happens in your organization?

Meeting Questions:

- What are some of the ways you have become involved in your project?
- What do you find prevents involvement?
- Has your involvement created challenges? What are they and how have you overcome them?

Action Step: Consider your own current involvement in a cause and assess how this can be improved upon.

Further Reading: Participants are encouraged to review Chapter Five, "How Do I Work With Grantees?", in Tierney and Fleishman's *Give Smart: Philanthropy That Gets Results.*[177]

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[177] Tierney and Fleishman, *Give Smart*, 151-189.

Topic 3: Navigating Family Dynamics

Goal: To discover one's agency as a mature adult through defining oneself outside of the founder's shadow.

Rationale: While each family is unique, there are basic dynamics at play within generous families of wealth. Failing to differentiate leads to frustration and resentment. Discovering one's unique contribution in family philanthropy will allow greater satisfaction and personal fulfilment.

Interview questions for Video:

- What do you believe are common challenges preventing health for wealthy Christian families?
- Describe how the founder's shadow impacts next generations.
- What is agency, and how do you see it being embraced by next generations?
- How does the family's wealth complicate the development of healthy family systems?
- What are some practical suggestions for strengthening one's own personal development as a contributing member of the family?

Meeting Questions:

- Have you experienced any of the challenges mentioned in the video? What are they?
- How does your family involve you and your siblings in your family philanthropy?
- Describe a moment when you felt empowered to influence your family's philanthropy.
- What has allowed you to best experience ownership of the giving done by your family?

Action Step: Write up a reflection in your journal that identifies what you are learning about yourself through this session.

Further Reading: A review of Chapter Seven, "Family Dynamics" in Gersick's *Generations of Giving* is especially pertinent to this topic.[178]

Topic 4: Power and Privilege

Goal: To understand the imbalances that power and privilege create, and to develop strategies to steward these for the benefit of others.

Rationale: Wealth and family of origin combine to create a highly imbalanced position for next generation givers. Learning to accept these gifts and to utilize their inherent potential wisely is an opportunity to be seized.

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[178] Gersick, *Generations of Giving*, 191-208.

Interview questions for video:

- Describe your family philanthropy context.
- Describe how you have chosen to live out your family's philanthropy through the causes you associate with and in your decision to live in downtown Washington.
- How do you intentionally minimize the power imbalance with your grantees?
- How does your understanding of the Gospel influence how you interact with others?

Meeting Questions:

- What are some of the indicators of your own power and privilege?
- Have you been tempted to hide your power and privilege? Why?
- How can power and privilege be channeled for good? Name some practical ways this can occur in the cause you are currently supporting.

Action Step: Identify one way you can practically position yourself to better share power and leverage privilege.

Further Reading: Edgar Villanueva's *Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance* offers a sobering perspective on power and privilege, with Step Four, "Relate", especially beneficial for the group.[179]

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[179] Villanueva, *Decolonizing Wealth,* 135-143.

Topic 5: Reinterpreting Failure

Goal: To understand that failure is a common experience in philanthropy, but much can be learned through these experiences.

Rationale: The change one seeks in the world is never easy, and failure often is a key marker in one's philanthropic efforts. Understanding how to learn from these rocky moments is necessary.

Interview questions for Video:

- Describe your involvement with philanthropic families over the years.
- You have witnessed some amazing successes and some dismal failures. How have you learned through these moments?
- How have donor families responded to situations that could be considered "failures"?
- How do you think giving with merely good intentions can lead to failure?
- Can failure lead to stronger commitments to moving forward together? How?

Meeting Questions:

- Have you experienced negative outcomes or disappointments in your own philanthropic involvement over the past months?
- How could these be averted?

- What can due diligence contribute to softening the possibility of failure?
- What other strategies allow for better outcomes?

Action Step: What failures have you experienced that can be considered in a new light?

Further Reading: When philanthropy fails, it's often the result of good intentions gone awry. Chapter Two in Lupton's *Toxic Charity: How Churches and Charities Hurt Those They Help* is enlightening for donors.[180]

Topic 6: Tempered Radicalism

Goal: To understand that social change doesn't happen instantly, and to accept the gift of incremental change.

Rationale: Idealism often heightens one's expectations. To the passion of youth, one must add realism grounded in wisdom to ensure longevity in one's philanthropy. Understanding that spiritual and social change often takes a generation to achieve is a sobering reality.

Interview Questions for Video:

- What has been your philanthropic experience and involvement to date?
- What can you tell us about the concept of patient capital?

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[180] Lupton, *Toxic Charity,* 11-29.

- In your involvement with Praxis, have you witnessed the concept of tempered radicalism?
- How has this type of approach been successful in implementing change?
- What are the dangers of “Big Philanthropy”?
- How does one’s Christian faith root philanthropy in wisdom?

Meeting Questions:

- Can you share an instance where your passion for a cause elevated your expectations for results?
- How do you think this initial expectation could have been tempered without losing your passion?
- Can you recall times over this year when small successes were celebrated? What were they?

Action Step: Find a small success to celebrate together with your organization.

Further Reading: Debra Meyerson applies the concept of tempered radicals to philanthropy in an excellent article in the *Stanford Social Innovation Review*.[181]

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[181] Meyerson, “The Tempered RADICALs.” 14-22.

Topic 7: Personal Transformation

Goal: To learn that Christian philanthropy is more than giving. It offers a pathway to personal transformation.

Rationale: Often one's focus is on effecting change in the world. Yet God often has other plans that include His desire for the giver to change.

Interview Questions for Video:

- Describe your involvement with Christian philanthropy.
- How have you witnessed change in yourself as you've become involved in grassroots organizations?
- What relationships have most contributed to your own transformation? Why?
- How does one best position themselves in order to truly change? What practices can lead one to transformation?

Meeting Questions:

- How have you been impacted through your connection to your project this year?
- While your involvement began with a gift given to others, have you found that you've received during the year?
- St. Lawrence indicated that the poor were the wealth of the church. Has this perspective on wealth influenced you these past months? How?

Action Step: Write a prayer in your journal that describes the transformation you want to experience.

Further Reading: Participants are encouraged to review Chapter Seven, "Giving Donors Opportunities for Participation" in Thomas H. Jeavons and Rebekah Burch Basinger's book, *Growing Givers' Hearts: Treating Fundraising as Ministry.*[182]

St. Stephen NB retreat: May 7-9, 2021

Goal

To witness how philanthropy that moves to and is embedded at the margins offers abundant opportunities for meaning and transformation.

Summary of Retreat

Locating the second retreat in a forgotten and neglected, deeply impoverished town in rural New Brunswick offers an opportunity for participants to reflect how Christian philanthropy can come alongside communities at the margins. Sessions focus on how philanthropy's inherent privilege and power can embed itself in situations of need, allowing opportunity for visible charitable impact, mutuality of relationship, and personal transformation.

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[182] Thomas H. Jeavons, and Rebekah Burch Basinger, *Growing Givers' Hearts: Treating Fundraising as Ministry* (San Francisco: Jossey-Bass, 2000), 114-130.

Agenda

Friday, May 7, 2021

Opening reception and introductions

Session 1: A philanthropy of place

This session considers the benefits to locating one's philanthropy within specific communities with opportunities and implementers known by the giver, using St Stephen as a case study.

Saturday, May 8, 2021

Morning contemplation

The group will reflect on Jeremiah 29:5-7 as a call for people living in exile to root themselves in a community and become contributing members to benefit one's society. Understanding what it means to be faithfully present in one's hometown is encouraged.

Session 2: The value of partnerships

Philanthropy cannot be done in isolation. Learning how to work with other key players is essential. A framework for understanding and working with diverse partners will be provided.

Session 3: Asset-based possibilities

A philanthropy that considers and leverages all assets within communities of need will be stronger and have greater impact. Assets are more than financial, with funds being merely a tool to energize other community assets for the benefit of others. Charity-philanthropist pairs will discuss their project's assets and discern how to best leverage these.

Following lunch, there will be a guided walk through town with eyes attuned to need and opportunity in this place.

Session 4: Cultivating spiritual vitality

Philanthropy that is centered in a love for God and neighbor requires intentional practices such as centering prayer, *lectio divina*, freedom from digital technology, and creating space for God. We will explore these off-site on the shores of Passamaquoddy Bay with the guidance of a trained spiritual director.

Session 5: Philanthropy at the margins

In this session, community leaders will join the group to explore how philanthropy done at the margins can reduce barriers and benefit a locality. This case study can be a model for other non-profit intervention by philanthropists.

Following a celebratory East Coast supper, participants and community leaders are invited to a Maritime kitchen party at a local home, Casa San Lorenzo, featuring live folk music with local band Colourful Language.

Sunday, May 9, 2021

Morning contemplation

Sunday morning will begin with learning simple Taizé songs and singing them together *a capella*. Simple melodies and harmonies by all voices demonstrate the beauty of collegial action together.

Session 6: A process for future philanthropy

Philanthropy that has impact has a solid process and structures to encourage discipline, intentional activity, and responsible giving. An invitation to consider one set of tools will be offered.

Session 7: Evaluation and wrap-up

Participants will gather for a roundtable evaluation of what worked and didn't work with the School of St. Lawrence, sharing ideas on how to improve the experience for future rounds.

Conclusion

For nine months in 2020-2021, the School of St. Lawrence will serve as an incubator for next generation philanthropy. Eight next generation participants will experience grassroots philanthropic engagement in person. Learning alongside them will be eight charity leaders, peers of the participants, who will benefit from the involvement of their donors and establish relationships of mutuality in pursuing their missions. Their charities, and the missions they seek to achieve, will be enriched through financial contributions and volunteer participation. This school will benefit the non-profit sector as well as nourish philanthropic families with skills and experience to shape their younger members for future leadership in generosity.

APPENDIX B:

BUDGET FOR THE SCHOOL OF ST. LAWRENCE

The following budget outlines revenue and expenses for Stronger Philanthropy, the consulting firm that is running this program.

Stronger Philanthropy Budget – School of St. Lawrence 2020				
In Canadian Dollars				
Revenue	**#**	**Per Person**	**Total**	***Notes***
Tuition	8	$6,250	$50,000	*Revenue from next gen participants*
Charity Participation	8	$6,250	$50,000	*Revenue from charity for 2 retreats*
Total Revenue			**$100,000**	
Expenses				
Flights to Toronto	8	$800	$6,400	*Estimate 50% (8 of 16) requiring flights*
Flights to NB	16	$800	$12,800	*Estimate 100% requiring flights*
Lodging and Event Space in Toronto	16	$500	$8,000	*2 nights lodging at guest house, meeting room*
Lodging and Event Space in NB	16	$500	$8,000	*2 nights lodging at St Stephen's University, meeting room*
Meals in Toronto	16	$300	$4,800	*2 breakfasts, 2 lunches, 2 dinners*
Meals in NB	16	$300	$4,800	*2 breakfasts, 2 lunches, 2 dinners*
Honoraria for Speakers	4	$500	$2,000	*4 outside speakers for some retreat sessions*
Resources (Books, Supplies, NB Bus, etc.)	16	$200	$3,200	*Miscellaneous resources for participants*
Program Management for One Year			$37,000	*Personnel costs incurred by 3 staff*
HST Payable	16	$813	$13,000	*Ontario Harmonized Sales Tax on Revenue*
Total Expenses			**$100,000**	

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