



FAMILY *Matters*

Volume 6, Number 1

Winter 2001

INSTILLING PHILANTHROPIC VALUES:

GROWING UP GIVING

Jomie Goerge

This Colina Foundation trustee lives, works and raises a family in the philanthropic tradition. Front page

HELPING KIDS HELP OTHERS:

Spotlight on Programs
These programs will give you ideas for your own communities. Page 2

MAKING ALLOWANCES

Teach your children to be generous, with answers to these commonly asked allowance questions. Page 3

COLLEAGUE VOICES

We talked to community and corporate foundations to find out how they teach kids about philanthropy. Page 4



A quarterly publication of the

COUNCIL ON FOUNDATIONS

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Growing Up Giving

Jomie Goerge, Trustee, Colina Foundation and Program Officer, The Fetzer Institute, Kalamazoo, MI, 616/375-2000, www.fetzer.org

While philanthropy was not a word we used in my household while I was growing up, it was a way of life. We never sat down and talked about doing philanthropy; instead, my parents were role models. They were both quite involved in community service and our church. For example, my dad's business made food baskets every Christmas to give to those who needed food that year. Going to the warehouse that Saturday in December was one of the highlights of my holiday. I loved the joy and community spirit that filled the air as we all worked together to compile those wonderful boxes full of food. I loved this day because it embodied the values that were prominent in my house—generosity, honesty, integrity, kindness, compassion, love and gratitude. Although I may not have called it philanthropy, I believed these values were part of my life and that I needed to live life according to them.

I was an adult when my father started the Colina Foundation. Because of its mission to help children in the downriver Detroit area, it has been fascinating to participate as a trustee to this foundation. When my father started the foundation, I asked myself, "What do you want to achieve in your lifetime?" I realized I wanted a family of my own, and I also wanted to make a difference in the world. I was fortunate to find a way to work toward achieving that goal—philanthropy. In 1995, I started

working at the Fetzer Institute, a private operating foundation that supports research, education and service programs exploring the integral relationships among body, mind and spirit. Fetzer has been a wonderful bridge for my professional and personal lives. It has allowed me to do work that fits my values and helps me to contribute to the greater good.



Having small children and working in philanthropy allowed me to reflect on my own upbringing. Now a parent of a two- and a five-year-old, I try to live and parent by the same values my parents held out to me (I have now learned the value of patience!). Childhood is the perfect time to lay the foundation for a life dedicated to loving—and helping—others. Young children learn most effectively from role models; it is a good way to instill your values in them. My husband and I have tried to highlight philanthropic practices in our home. For instance, when my kindergarten asks why he has to feed the dog, we respond, "Because it is part of your responsibility as a member of this community. We all need to take care of each other; it's just what we do."

Children also learn to give outside of the household through churches and schools. As a family, we have purchased toys for the Toys for Tots campaign, sponsored a family at Christmas, bought mittens and hats

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"Childhood is the perfect time to lay the foundation for a life dedicated to loving—and helping others."

—Jomie Goerge



Helping Kids Help Others: Spotlight on Programs

Looking for ways to inspire your kids to give? Don't worry—you can find help outside the home. There are countless programs available to teach children philanthropic values and lessons in money management. Here are just a few examples.

School Days

Learning to Give Project (formerly K-12 Education in Philanthropy Project)

The Council of Michigan Foundations developed an innovative program to teach students in kindergarten through the

The grassroots project works directly with classroom teachers, who attend a weeklong institute in philanthropic education and then write lessons for each grade. According to Executive Director Kathy Agard, "The lessons are not meant to be separate from the regular school curriculum.

Instead, they are knit into everything teachers are teaching throughout the year." So far, more than 900 teachers in 36 states have field-tested the project. Teachers can download these free lessons from the Web site, www.k12edphil.org. For information on how to bring the Learning to

Youth Service Charleston

An example of one of the many programs that focus on youth and grant-making, Youth Service Charleston is a nonprofit organization that partners with the Community Foundation Serving Coastal South Carolina. The yearlong program chooses 20 high school students to form a grants committee and make awards of \$15,000 to \$20,000. Students map community needs and assets, determine a funding focus, write and review requests for proposal, make site visits, and choose which organizations will receive the award. "Like adults in family foundations, these students have to work to find common ground and compromise to do the most good," says Program Director Amy Wiedeman. For more information on Youth Service Charleston or how you can start a similar program in your area, contact Amy Wiedeman at 843/937-6523.

Internships

Internships offer students of all ages a valuable course in foundation management. Many foundations offer summer internships, including the Pottstruck Scott Family Foundation in San Francisco, which offers an Internship in Nonprofit Management and Philanthropy. According to Executive Director Nancy Wiltsek, the eight-week internship "develops a student's understanding for and commitment to the nonprofit sector, supporting future leadership for that sector." The C.E. and S. Foundation in Louisville, Kentucky offers internships to both high school and college students. Bruce Maza, executive director of the C.E. and S. Foundation,

FAMILY MATTERS is the quarterly newsletter for family foundations, published by the Family Foundation Services department of the Council on Foundations. Complimentary subscriptions for trustees of Council members are available by contacting Family Foundation Services at 202/467-0433 or gaste@cof.org.

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STORY IDEAS INVITED

Themes for upcoming issues may include the following:

Sharing Resources among Family Foundations ● Emerging Foundations ● Board Development ● Trends in Family Philanthropy ● Managing Foundations Without Staff. Please submit ideas for authors and articles for future editions to the editor, Elaine Gast, at gaste@cof.org.

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says “The foundation is deeply committed to internships with young people. The perspective that young minds bring to our work is often enlightening.” For a list of foundations that offer internships, call the Council at 202/467-0433 or e-mail gaste@cof.org. For more information on the above internship programs, contact Nancy Wiltsek at 415/495-6244 or Bruce Maza at 502/583-0546.

Beyond School

Post Grad Fellowships

In its ninth year, the El Pomar Fellowship in Community Service programs brings highly qualified college graduates to the El Pomar

Foundation in Colorado for a two-year paid position. Associate Director Gary Butterworth describes the Fellowship as an opportunity for “young emerging leaders to learn about nonprofits and philanthropy.” Among their many opportunities, fellows run El Pomar’s Youth in Community Service (EPYCS) program, which teaches high school students the importance of service, philanthropy and the nonprofit sector. Currently, a staff of 12 (of 22 fellows) works with 112 high schools, transforming students into a “mini-foundation” that raises money, evaluates proposals and makes awards. In addition to EPYCS, fellows also

participate in a speaker series, which enhances public speaking skills, and nonprofit, fundraising and investment courses. Fellow Brooke Morrill, 23, a former EPYCS student, describes the rewards of the Fellowship experience. “We are engaged in different issues and able to proactively work to make a difference in the community.” Contact the El Pomar Foundation at 800/554-7711 or www.elpomar.org.

The Indiana University Center on Philanthropy also offers a ten-month fellowship program for recent college graduates. The Jane Addams-Andrew Carnegie Fellowship Program in Philanthropy advances and renews interest in public service by engaging fellows in intensive study and volunteer activity. Fellows receive an introduction to the philanthropic tradition—its history and role, its ethics and values, its opportunities and limitations and its responsibilities. For more information, see www.philanthropy.iupui.edu/carnegie.htm or contact 800/854-1612.

Making Allowances—Q & A

When should I start teaching my children about money?

As soon as they can talk in sentences, says a recent study from Colorado State University. Parents who make allowances are not just doling out candy money; they are giving their children a lesson in money management. According to the study conducted by Cooperative Extension, receiving an allowance teaches the value of money, promotes independence, encourages communication and provides practice in living on a regular income. For more information on this study, contact Jan Nixon at 970/522-3200.

How much is too much?

The amount that parents give their children varies, depending on how much money they believe the child can manage. A 1997 Ohio State

University study found that half of all teenagers get an allowance, typically about \$50 a week. For teenagers from families with annual household incomes of at least \$100,000, the average allowance was \$175 a week. Teenagers in households earning between \$20,000 and \$30,000 a year received an average of \$19 a week.

How can I encourage my children to use their allowance money to help others?

A small, but powerful, way to influence school age children is to divide their allowance in thirds, with one-third available for spending, one-third for saving and one-third for giving. According to Kim McGuire, program director of the Community Foundation of Western North Carolina (mcguire@cfwnc.org), “My nine-year-old daughter is plotting to whom she will give her donations at the end of the year. She is very interested in learning about various nonprofit programs—and surprisingly savvy in her analysis of them.”

Growing Up Giving

Continued from page 1

for a mitten tree, and volunteered countless hours in these communities. These are all fairly simple ways to serve our community, and I know that as my children grow, so will our philanthropic commitment. I am anxious for the day when my children will share in the experience of working with our family’s foundation. My children understand that we are blessed to be in a position to give our time and money to others, but they also know that as we give, so shall we receive. Teaching our children how to do both is not only a gift for them, but also a gift to the whole human family.



Colleague Voices

We asked community and corporate foundation colleagues what donors are doing, either in their programs or in their homes, to shape philanthropic values in kids. Here is what they said.

Letting Children Choose

Doug Hertz, donor to the Atlanta Foundation and founder of the Hertz Family Foundation, believes that volunteering is one of the best ways to teach children about the pleasures of helping others. His daughter Amy, 20, volunteers at a camp for chronically ill and disadvantaged children in Rutledge, Georgia (the very camp Doug helped establish). His son Michael, 17, volunteers in elementary schools as a reading skills assistant. "I encourage them to get involved with whatever type of charity they want, based on their passions. It should be their decision. The best thing I can do is set an example for them, and tell them to find something they are good at and do it." Contact Doug at 678/305-2010.

Generous Grandchildren

Parents don't have to be the only ones to teach philanthropic values to their children. In many cases, other relatives do the job for them. According to Fran Munson of the Community Foundation of Greater Lakeland, "We have a donor who gathered all his grandchildren together and challenged them to go out and find a nonprofit they believe is making a difference in our community. He asked them to compose a letter stating why they picked the nonprofit. Each nonprofit chosen will be awarded \$500 along with the letter from the child. The size of the grant will increase as the grandchildren get older. It's a great concept." Contact Fran at fmunson@lakeland.net.

Seasons Givings

Tired of the excess of the holiday season? This family created its own idea of gift exchange. Bonnie Marsh, executive director of the Bay Area Community Foundation in Michigan explains. "We told family (our children were in their early 20's) and friends that we would no longer accept any holiday gifts and we would no longer give any holiday gifts. Instead, we were going to send cash gifts to charities in honor of our children and others. We asked that they do the same and suggested a few charities that we would approve of their supporting. This practice went over pretty well with everyone and we found our children

taking an interest in finding out exactly what our preferred charities were about. Now our children are married and may soon be starting families of their own. We plan to buy gifts for our grandchildren, but at a time we believe the grandchildren will understand, we will let them know that half of what we spend on them will be given to a charity. The grandchild will be the one to select the charity with our help. Can you ever start too early?" Contact Bonnie at bacfnd@bayfoundation.org.

Real GO-Getters

GO (Girls Outreach), an educational effort of the Women's Fund of Central Indiana, focuses on teaching young girls about the needs of girls in their community. To participate in GO, an adult creates a donor-advised fund in the name of a girl up to 18 years old. The Women's Fund encourages the donors and others to make donations to her fund for birthdays and other special occasions. In addition, the young girl herself may contribute. When the girl reaches age 18, she may donate funds to the charity of her choice. For more information on this program, contact Director Jennifer Pope Baker at 317/631-6542 ext. 127.

The Philanthropist Wears Sneakers

The PGE-Enron Foundation—the corporate foundation of Portland General Electric—developed Community 101, a youth involvement program that teaches high school students the importance of community service and philanthropy, while empowering them to directly impact Oregon communities through grantmaking. Modeled after Colorado's El Pomar Youth Community Service (EPYCS) program, the idea behind Community 101 was to turn a piece of the foundation over to high school students, giving them a taste for the rewards of philanthropy. "Community 101 is all about service," says Carol Reed, education coordinator. "It is an opportunity for students to learn where the real need lies in their community, and how much work it takes to address that need. In the process, they come to recognize the connection between families, schools, communities and workplaces and their role in contributing to a livable society." For more information, contact Tara Mahoney, 800/800-7132, tmahoney@gardandgerber.com.



ON THE BOOKSHELF

Resources for Instilling Values

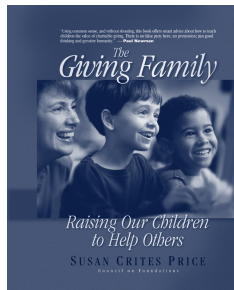
NEW

**The Giving Family:
Raising Our Children to Help Others**

With consumerism at an all-time high, the Council on Foundations has just published a guide to help parents teach children, from toddlers to teens, how to use their time, talent, and, yes, their money to help others.

In her new book, Susan Crites Price explains how parents, teachers, religious leaders and other adults can instill the spirit of giving and volunteering in children. In addition to scores of ideas and real stories, you will find specific tips, exercises and resources that are easy to use in any home.

It's never too early—or too late—to start teaching children the habit of giving, whatever the family's financial circumstances. This useful how-to guide for parents with children (ages five to 18) highlights the importance of exposing kids to philanthropy and volunteerism, and includes age-appropriate examples. 120 pages; \$19.95. To order, call 888/239-5221 and ask for # 822, or go to www.thegivingfamily.org.



**Philanthropy! Hard to Say, Fun to Do!
A Guidebook for Raising Kids Who Give, Share and Care**

This book provides a framework for activities and conversation regarding your family's beliefs and values about philanthropy. Includes a section on how to encourage the teaching of philanthropy in your area's schools and colleges, and provides curriculum samples from the Learning to Give Project (formerly K-12 Education in Philanthropy). 151 pages. Contact the Council of Michigan Foundations at 231/767-7205; <http://k12edphil.org>.

Look What Kids Can Do: Youth in Philanthropy

This book details organizations and projects providing opportunities for youth to engage in philanthropy. Includes youth on boards, as grantmakers and as volunteers. Contact The Conference of Southwest Foundations, 214/740-1787; www.c-s-f.org.

**The Giving Book:
A Young Person's Guide to Giving and Volunteering**

Three volumes cover separate age groups: 5-8, 9-12 and 13-17. These books are for children but include instructions and activity ideas parents can use with their children. Order by calling the Milwaukee Foundation at 414/290-7350; www.milwaukeefoundation.org.

Money Talks. So Can We.

This resource for people in their 20's explores the impact of money on our lives. This guide includes personal stories, technical information, reading lists and articles about some of the political, personal and social issues of wealth. 71 pages; \$12. Contact Resource Generation at 617/441-5567.

**Engaging the Next Generation:
How Nonprofits Can Reach Young Adults.**

Produced by the Ad Council and MTV: Music Television, this 36-page booklet describes research related to youth volunteerism. It provides practical tools for attracting volunteers and developing a communications plan. For your free copy, call 212/922-1500 or download an electronic version from www.adcouncil.org.

Sites to See

- Youth Understanding Philanthropy Project—www.philanthropy.iupui.edu/transmit.htm
- Kellogg Foundation—www.wkkf.org
- Achieving Change Together—www.achievingchange.org
- More Than Money—www.morethanmoney.org
- The Inheritance Project—www.inheritance-project.com
- FamilyCares—www.familycares.org
- Family Matters—www.pointsoflight.org
- Impact Online—www.volunteermatch.org
- Helping—www.helping.org

Next Issue

Looking for ways to cut costs and collaborate? See the May issue of *FAMILY Matters* on sharing resources with your colleagues. Send your story ideas to Elaine Gast, editor, at gaste@cof.org or call 202/467-0433.



LEGALLY SPEAKING

New Tax Regulations for Foreign Grants

Effective January 1, 2001, foundations may be required to withhold taxes on grants to foreign individuals and/or organizations. New regulations, under Section 1441 of the Tax Code, affect foundation payments to foreign entities when the payment will underwrite activities performed in the United States. These regulations generally require foundations to withhold U.S. taxes from their payments if they make grants or award prizes to foreign individuals or organizations that perform all or part of their grant-funded activities in the United States. The withholding requirement will not apply to any portion of a grant that will be used exclusively for activities performed outside of the United States. If the recipient qualifies for an exemption under a U.S. tax treaty or the recipient organization can establish that it could qualify as a U.S. tax-exempt organization, withholding may not be required.

With the help of the law firm Caplin and Drysdale, the Council on Foundations' legal department has prepared a memorandum that highlights the new tax withholding requirements for foreign grants and suggests practical ways to ensure compliance with the new rules. You can view this document at www.cof.org/legal/index.htm, or contact the Council at family@cof.org or 202/467-0433 to receive a copy. If you have additional questions, contact the Council's legal department at 202/467-0466.

STATS and FACTS

Boston, MA—According to the 2000 Cone/Roper Charitable Children Survey, an overwhelming majority of Americans (85 percent) agree that children should be introduced to charities by the age of thirteen, and even more Americans (94 percent) feel that parents play a key role in getting children involved. Yet nearly three-out-of-four parents (70 percent) admit their children are not involved in any charitable activities. According to the study, parental activity is key in encouraging youth philanthropy. For more information on this study, contact Anne Chan at 617/227-2111 or achan@coneinc.com.

DID YOU KNOW?

The United Nations has declared 2001 the International Year of Volunteers. More than 100 countries will celebrate the achievements of millions of volunteers worldwide and encourage more people to engage in volunteer activity. Find out how you can get involved in the United States as an individual, a family or a group at www.iyv2001.us.org.

Council News

More News is Good News

The Council is pleased to announce a new member service. For breaking foundation news, subscribe to the Council's weekly e-newsletter, *Foundation News and Commentary Now*. *FN&C Now* provides brief, timely news on foundations and issues of interest to members. And it's free. To subscribe or submit news items, e-mail fncnow@cof.org or contact Paula J. Kelly at 202/467-0261.

In addition, the Council media relations department has created a news clips e-mail list. Subscribers receive an index of major news clips related to philanthropy. This service is free to Council members. Subscribe by e-mailing Mike Guerrero at guerm@cof.org.

Inspiring Kids to Give: 8 Simple Steps

- Be a role model—a volunteer and a donor.
- Show kids the way—take them with you to volunteer; talk to them about your donations.
- Make giving a year-round project, not just something to do at the holidays.
- It's never too early—or too late—to start. But the earlier you teach the habit of giving, the easier it will be to sustain.
- Expect your children to serve and give.
- Let children decide what projects to support with their money and time.
- Teach them to manage money.
- Praise them for their philanthropic actions.

The exercise above is an excerpt from

The Giving Family: Teaching Our Children to Help Others, by Susan Price, Council on Foundations, 2001; www.thegivingfamily.org. See On the Bookshelf for more information.



What's New in Family Foundation Services?

NEW

Visit the Virtual Conference—Online!

Join the 2001 Family Foundation Conference Online. For the first time, members can access selected information from the February 12–14 conference—via the Internet. The Family Foundation Virtual Conference will debut on February 21, 2001, and remain online until December 2001. The site will include summaries of selected sessions, handouts, Web links and resources and speaker bios. To access the Virtual Conference, you will need a computer with at least 56K modem, Internet accessibility and your Council member user ID and password. If you have forgotten your ID and password, e-mail **membership@cof.org**. This service is free to Council members. To learn more about the Virtual Conference or other educational offerings, contact Sophie Dunbar at **dunbs@cof.org** or call 202/467-0423.

Wanted: One Good Intern

Presenting our opportunity for engaging young adults in philanthropy! The Council on Foundations is pleased to announce its annual summer Internship for Family Philanthropy, offering a meaningful, in-depth exposure to philanthropy, an opportunity to witness and absorb philanthropic values and hands-on training for future service in organized philanthropy as a board member, staffer or volunteer.

Students, just out of high school through the Ph.D. level, who are studying (or planning to study) any related discipline (e.g., divinity, government, nonprofit administration, public policy, philanthropy) are encouraged to apply. Preference will be given to those who are serving or are likely to serve in the future on family foundation boards or staff; are serving or are likely to serve on nonprofit boards or staff; and/or are active volunteers.

Based in Washington, DC, this paid, full-time internship will last from six to 12 weeks by agreement between the Council and intern. To apply, send a letter of interest, a resume and two references to Managing Director Karen Green, Council on Foundations, 1828 L Street, NW, Washington, DC 20036, no later than April 20, 2001. Questions? Send e-mail to **family@cof.org**.

CALENDAR

March 14-15, 2001

Strategic Grantmaking Symposium
For Individual Donors and Trustees of Family Foundations
The Regal Bostonian Hotel, Boston, MA
The Philanthropic Initiative, Inc.,
617/338-2590

March 17-20, 2001

Jewish Funders Network National Conference
Ritz Carlton, Atlanta, GA
212/726-0177, www.jfunders.org

April 30-May 2, 2001

52nd Annual Conference of the Council on Foundations
Philadelphia Marriott, Philadelphia
Conference Information, 202/466-6512

May 16-20, 2001

More Than Money Conference
San Francisco, CA
Alison Tshikosi, 781/648-0776

May 17-19, 2001

The Third National Conference on Black Philanthropy
Detroit Marriott Renaissance Center, Detroit, MI
National Center For Black Philanthropy, Inc., 202/530-9770



"Son, now that you've turned sixty there are a few things you should know about the family."

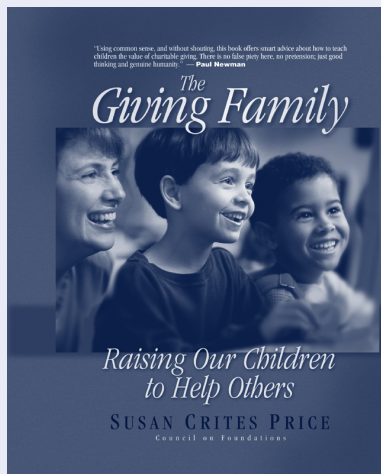
Read *Family Matters* online at www.cof.org/newsroom/newsletters/familymatters.index.htm.



NEW BOOK!

The Giving Family: Raising Our Children to Help Others

Published by the Council on Foundations



It's never too early—or too late—to start teaching children the habit of giving, whatever the family's financial circumstances. This useful guide can show you how.

Here is what others are saying about *The Giving Family*:

"Using common sense, and without shouting, this book offers smart advice about how to teach children the value of charitable giving. There is no false piety here, no pretension; just good thinking and genuine humanity."

— **Paul Newman**

"This book will jog families to think about our responsibility as parents to instill a sense of altruism in our children. We are a fortunate nation and we need to share our privilege with the 25 percent of children who are below the poverty line."

— **T. Berry Braselton**, Professor Emeritus Pediatrics, Harvard Medical School

"The Giving Family can start children on the fulfilling journey toward generosity. It is a reader-friendly, practical and upbeat way for families to get their children excited about philanthropy in America."

— **Dorothy Ridings**, president and CEO, Council on Foundations

By Susan Crites Price for the Council on Foundations. 120 pages; \$19.95. To order, call 888/239-5221 and ask for # 822 or go to www.thegivingfamily.org. See inside for more information.



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