



Here Are Four Things We're Learning About Family Philanthropy

Ade Adeniji | January 12, 2023



BRANDON BOURDAGES/SHUTTERSTOCK

About a year ago, Inside Philanthropy and the National Center for Family Philanthropy (NCFP) began partnering on a series of profiles exploring different approaches to family philanthropy. As the lead writer of the series, I was excited for the opportunity to have conversations with a range of families who give at high levels. In the case of a legacy foundation, staff can give you a pretty good sense of where the institution is coming from, but for a family foundation, you really need to talk to family members to get the full story.

One of my big takeaways in writing about this sector over the years is that philanthropy is biography. Find out who someone is and what their personal story is, and it always drives the story of their giving. So in telling the personal stories of family foundations, trust is key. While it took some time to get there in some cases, I've really appreciated the way the families I interviewed were willing to open up and even develop the language to explain their long journeys of giving.

So far, we've written up eight profiles, including the story of how the next [generation of the Disney family](#) drives the foundation's social justice philanthropy, how billionaire [tech couple Tegan and Brian Acton](#) use multiple charitable vehicles and donor-advised funds to deploy their funds, and how [the Compton Foundation](#) fractured and then embraced the power of spending down. After a while, we began to hear some familiar echoes across the families in these profiles, a good reminder that no one in this space operates in a vacuum. We'll be rolling out more family philanthropy profiles this year, but we thought this would be a good time to share a quick rundown of some trends and patterns I've noticed so far.

Place-based giving is personal, not just a strategy

When Kathy Deggendorfer and Erin Borla, the next-generation members of the [family behind Columbia Sportswear](#), spoke lovingly of Sisters, Oregon, a town with a population of approximately 2,600, it became clear to me that place-based giving is often deeply personal. It's about home as much as it is about proximity.

This giving often leaves important community institutions in its wake. Roundhouse Foundation's Pine Meadow Ranch Center for Arts and Agriculture, an artist residency on a 260-acre working ranch, aims to bolster the creative community in the Sisters region. The center also engages in agricultural and ecological projects to improve the local environment.

Another example is Sobrato Philanthropies' four [Sobrato Centers for Nonprofits](#), which began all the way back when John Sobrato's mother Ann built a multi-tenant property in Milpitas. When she passed away, she left her 50% stake in that asset to the family's foundation. John A. Sobrato then bought out the other owner and gave the space to nonprofit tenants who could use the property rent-free.

Of the Sobrato family, Catherine Crystal Foster, a Bay Area veteran social impact leader, said, "For many years, they were giving a lot of capacity-building funding, which was great, and giving general operating support. They really went deep on a local level."



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Family philanthropy requires difficult conversations

Many next-generation family members talked about difficult conversations they had with their parents and grandparents about the direction of the family's philanthropy. In the case of David Perrin, the son of a former Duracell CEO, he returned from working at [Resource Generation](#), which helps young people of privilege redistribute their money and power, with some new ideas. Not all of these ideas were immediately well-received, but ultimately, the energy coming from the next generation could not be denied.

In one notable case at the Compton Foundation, which is rooted in the family behind the Ralston Purina Company, these difficult conversations led to a fissure. Fourth-generation family member Vanessa Compton Davenport, a visual artist in Vermont, found herself in a battle between her own values and the values of her family. Ultimately, she realized that she needed to go in a different direction than some of her family members, working closely with changemakers outside the family and leaning into the power of a spend-out. That left a divide in the family, but Davenport and her staff remain focused on directing vital resources to grassroots organizations until the foundation shutters by the middle of the decade.

Families use a variety of giving structures, but can still operate with transparency

Small family foundations often do not have websites, forcing those covering the philanthropy beat to comb through 990s longer than my Christmas list in third grade. This was not true of any of the foundations we profiled, which all had well-run websites. But more to the point, even the families that used donor-advised funds, which don't have the same disclosure requirements, did so with a surprising amount of transparency.

Acton Family Giving and Solidarity Giving, the two donor-advised funds of Brian and Tegan Acton through Fidelity Charitable, offered some important advantages for the couple. However, they sought to avoid the common problems of DAFs by publishing their grants and honoring a minimum payout as if they were foundations.

The Sobrato family also embraces DAFs. The broader family engages in collective work through the Sobrato Family Foundation, and several branches of the family each have their own donor-advised fund to conduct more personalized giving. John Michael and Timi Sobrato even pull 501(c)(4) levers in order to advocate for environmental change. And their son Jeff Sobrato uses DAF giving to back socially conscious documentaries like "[Battleground](#)," a film about the rolling back of abortion rights.

Bringing in the younger generation early

It's true that younger adult family members introduce new directions to family giving, often galvanizing more progressive philanthropy. But in this case, I'm talking about families bringing in children and grandchildren on board. The Tarsadia Foundation in Southern California is a [three-generation operation that involves](#) upward of 50 family board members in total. The family introduces philanthropy, running a junior board for family members aged five, to 21 to engage in actual grantmaking and plan service trips.

At the Perrin Family Foundation, David and his brother Jeff joined as trustees when the foundation started years ago. And while the two young children of Brian and Tegan Acton are still more focused on Pokemon than anything else, the time could perhaps come sooner rather than later.

There are other themes we might've mentioned here, including families looking at more ways to share power in their communities, how different voices are weighed in board meetings, and trust-based philanthropy. Many of these ideas and more can be found in our profiles. And as we continue to get to know more families, expect new patterns to emerge.

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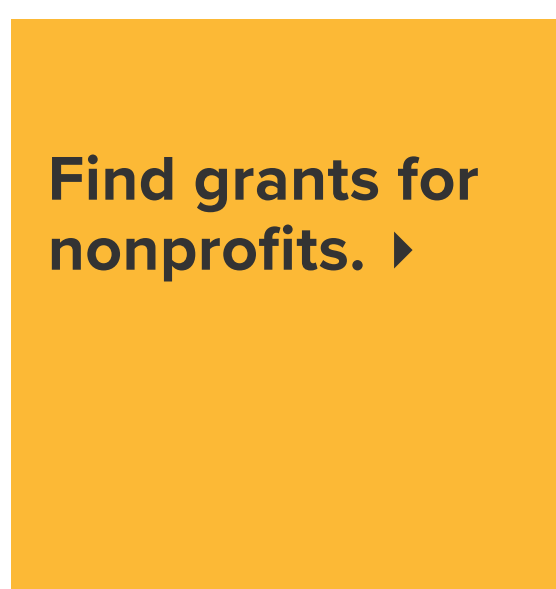
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