



# FAMILY *Matters*

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## TELLING OUR STORY

### SHARING OUR STORIES, IMPROVING OUR WORK

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## COUNCIL ON FOUNDATIONS

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## Sharing Our Stories, Improving Our Work

By Bill Graustein, Trustee  
William Caspar Graustein Memorial Fund

*"Those who do not have power over the story that dominates their lives, the power to retell it, rethink it, deconstruct it...and change it as times change truly are powerless because they cannot think new thoughts."*

—Salman Rushdie



I stumbled across the power of storytelling ten years ago when preparing the William Caspar Graustein Memorial Fund for a hundredfold increase in assets. A story my dad told me as a child took on new layers of meaning when I explored it as an adult. I first heard the story as a fable, a gentle way of telling me how the world worked, and a lesson on how to deal with it. As I thought about the story while working on the Memorial Fund, I came to understand it as a story of a turning point in his life, of the friendships and insights that helped him move from inner-city immigrant kid to corporate CEO. This story served as a landmark, as we navigated through developing the Memorial Fund's vision, mission and practices, and led us to focus on the growth and development of our grantee partners.

My experience with my own family story is unusual only in its specifics. We all have a story to tell about our lives and visions, and

through our foundations, we are inviting others to work with us toward that vision.

Storytelling is, at its heart, about the relationship between people and places and how these relationships change with time. It is in conversation about stories—the sharing of associations, reactions and different views of the same events—that we come to understand more fully from where we have come, to explore with others what we wish to become, and in Salman Rushdie's words, to think new thoughts.

We continue to use story in our work. I recently asked the staff of the Memorial Fund to take a few minutes to describe the grant or relationship that had been most satisfying to them over the past year. Each person's story, though different, shared a common theme. In each story, the people with whom we worked created a new vision for their future or developed the skills to help turn their visions into reality. I can think of no better memorial than to take joy in helping others make the same kinds of transitions.

Working with stories is communal work: A teller creates the space to reveal something and, in doing so, invites listeners to do the same. In this interchange of fact and imagination, we expand the possibilities for the way we interact. We hope this issue on storytelling gives you a start at expanding your own foundation's possibilities.

This issue of FAMILY MATTERS describes different ways in which family foundations have used storytelling to help them with their work. In the pages that follow, you will find practical tips for telling your foundation's story to different audiences through live, face-to-face interviews; donor intent letters; videos; and archives.


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**MEMBERSHIP INFORMATION**

For information on becoming a member of the Council on Foundations, call 202/467-0463 or e-mail [membership@cof.org](mailto:membership@cof.org).

## Interview with a Storyteller

*Catherine Conant has been a storyteller, teacher, speaker and coach for more than ten years. She uses the art of telling stories to build bridges between generations, foster stronger communities and remind people that stories are the way we make sense of the world around us. FAMILY MATTERS sat down with Conant and discussed storytelling.*

**Q. Why should family foundations tell their story?**

A. Stories reflect the history and values of the family and the foundation, and give a sense of what the organization represents, how it came to be and how it carries out its mission. Because family foundations are grounded in something as intimate as a family, people want to hear their story—how the family made the choices it did, how the foundation emerged and evolved. Learning the personal histories of family foundations will cause people to think, “If they could do it, maybe my family could, too.”

**Q. What are the benefits of storytelling?**

A. Storytelling is a process, not an event. It is an opportunity for introspection and a way to connect with yourself, your history and your listeners. The process builds a collaborative relationship—the teller speaks to the story, the story speaks to the listeners and the listeners reflect back to the teller. Because of this, the act of storytelling actually makes one a better listener—a tool that will help us in our work and our lives.

**Q. How should family foundations get started with storytelling?**

A. Storytelling isn’t something we can do in solitude. The best way to start is to work with someone who can reflect back to you uncritically. Look for a local storytelling guild, find a coach or join a story circle (see *Storytelling Sites*, page 5). Each of these resources can give you the tools you need to create your own story—for instance, the narrative structure of oral stories, a point of reference or prompts to get started and a community to help you along the way.

For more information, visit Catherine Conant’s website ([www.4astoryteller.com](http://www.4astoryteller.com)).

## Quick Tip for the Board

Ask board members to tell their story. For example, each can pick one word from the mission statement and describe what it means to them. This technique often reveals their underlying values, motivation for their philanthropy and/or the reasons they joined the board. This exercise can be practiced at the beginning of a board meeting or retreat, or during new board member orientation.



## Sharing the Story: Generation to Generation

The best way to pass on the foundation's history, mission and values to the next generation is through personal stories. Stories provide a solid orientation for youth and young adults, and may even create a moving, lasting legacy. The following questions give you points of reference to begin your own story and can also serve as prompts for a personal interview, an oral history audiotape or a video:

- Why did you start (or join) the foundation?
- What was a key moment in your life that made you think about helping others?
- When was the first time you volunteered your time or talents?
- Who were the major influences in your life, and how did they influence your philanthropy?
- What did you hope to accomplish through a foundation, and has this changed over time?
- What are your passions behind what the foundation funds?
- What is the most important value you hope to pass on to your family?
- What do you consider the foundation's biggest success?
- What do you envision for the foundation in the future—its board, its operations, its funding focus? Should the foundation exist in perpetuity? How closely should future generations to follow your donor intent?

## Colleague Voices:

### Why Is Storytelling Important in Family Philanthropy?

Storytelling...

"Helps the next generation understand how the foundation made its money, why it started, what philanthropy means."

—Tracey Boldemann, Gerald Oppenheimer Family Foundation

"Honors philanthropists by celebrating their life and legacy."

—Sharna Goldseker, The Andrea and Charles Bronfman Philanthropies, Inc.

"Develops a lore that can capture the purpose of the foundation in a rich, nontechnical way...keeping past success stories fresh."

—Brooke Lea, Helen Sperry Lea Foundation

"Teaches others about philanthropy, reaching people in the community who may not be aware that philanthropy even exists."

—Carrie Avery, The Durfee Fund

## CALENDAR

### December 10

#### INSTITUTE FOR NEW BOARD MEMBERS

Washington, DC

Ellen Bryson, 202/467-0438

[www.cof.org/conferences](http://www.cof.org/conferences)

### December 11-13

#### INSTITUTE FOR NEW GRANTMAKERS

Washington, DC

Sophie Dunbar, 202/467-0423

[www.cof.org/conferences](http://www.cof.org/conferences)

### January 17-21, 2003

#### INSTITUTE FOR FAMILY FOUNDATIONS

Maui, HI

[www.iffadvisors.com](http://www.iffadvisors.com)

### January 30-February 1, 2003

#### SOUTHERN CALIFORNIA ASSOCIATION FOR PHILANTHROPY

##### WomenGive!

Newport Beach, CA

818/242-9108

### February 24-26, 2003

#### 2003 FAMILY FOUNDATION CONFERENCE

Council on Foundations

San Jose, CA

[www.cof.org/conferences](http://www.cof.org/conferences)



## Foundations on Film

If as the Chinese proverb states that a picture is worth 10,000 words, then a video can speak volumes. Videos are a wonderful way for donors to express their values in a form that future generations of family and board members can cherish.

When **Arthur M. Blank's** daughter and foundation staff asked him to consider making a video, he agreed that it would be important. Even though the foundation has only been active for five years, Blank understood the importance of preserving his wishes. The staff of the Blank Foundation developed questions and hired a videographer to shoot and edit the 20-minute video, which was filmed in Blank's home.

Questions included those on governance, perpetuity, grantmaking and the donor's own values. The staff unveiled the video at a board retreat and has since distributed it to trustees, family members and other family foundations.

According to executive director Deva Hirsch, the video accomplished three goals: (1) to prompt the donor to articulate his own goals and aspirations for the foundation over the long term, (2) to give his family members an opportunity to hear him describe his values, and (3) to give the foundation board and staff direction and clarity in carrying out his wishes in the future. "It's uncomfortable thinking about a loved one leaving our lives, but if you don't know their wishes, it would feel even worse,"

said Hirsch. "We work closely with our founder and trustees now to ensure we understand their goals and wishes for the future."

The **Halcyon Hill Foundation** also preserved the values of its founder on videotape. Five years ago, the founder told the story of the foundation to her children—her reasons for starting the foundation and her hopes for its future. "Her storytelling created a wonderful moment, one that we wanted to capture somehow," recalled administrator Annette Weld. In a group decision, the family hired local videographer David Rose of Rose Films, Inc., who developed questions and separately interviewed the founder and her three adult children. The 25-minute video includes their responses edited together with archival photos and footage of the grandchildren playing. The video was shown for the first time after a board meeting. According to Weld, "We gathered around with popcorn and Kleenex to watch it for the first time. It was touching to see how the foundation matured and how Ann's children had grown comfortable being active participants over time." Although the video will mostly be used for the family, it will also be shown to future board members as a part of their orientation. "The video is one the kids and grandkids will treasure for generations to come."

*Thinking of creating a video? For sample interview questions, contact Elaine Gast at the Council on Foundations, 202/467-0433 or [gaste@cof.org](mailto:gaste@cof.org).*

## Newsletters Spread Stories Among Family

Family newsletters can be an excellent way to keep the family in touch and involved in philanthropy. The Andrus Family Philanthropy Program (AFPP), conceived by the Surdna Foundation and the extended Andrus family, keeps its more than 300 family members educated and involved through an annual newsletter called *Concinnity*, which is the family's special name for its five reunions held since 1973. Board and family members write feature stories of the five family philanthropies and short items that highlight a variety of

volunteer opportunities. The *Doers* column, in particular, recognizes family members from every generation who have given of themselves and their time. "The newsletter is an excellent tool for providing awareness, education, and in some cases, opportunities to participate in the family's philanthropic work," said AFPP Executive Director Steve Kelban. "Its stories keep people connected and gives them a better picture of each of the family philanthropies." To view an issue of *Concinnity*, visit [www.affund.org/PDFs/Concinnity.pdf](http://www.affund.org/PDFs/Concinnity.pdf).



## Archiving: Let the Records Speak

What do you do with all those old foundation files—stow them in an attic, in a storage space, in the trashcan? Instead, have you considered starting an archive? An organized collection enables the donor family to create a legacy—one for future generations to discover and embrace. Archives can be a tool to help a family pass on its history and values to children, grandchildren and future board members, alike. They can also teach the public about philanthropy from a historical perspective.

What should an archive contain? Here are some ideas:

- Minutes from board meetings
- Grant files
- Annual reports
- Oral and/or written histories
- Press clippings
- Photographs
- Videos
- Correspondence
- A family tree

What can you do with your archive? If the foundation is headquartered in a home or small office, consider scanning the material and storing it digitally. If you do not have the room or technology to store the archive yourself, you might donate your archive to a local library, repository

or historical society. They have the tools to preserve your materials, and they can advise you on what has historical value. For more information on where to donate your archive, contact the Center on Philanthropy at Indiana University or the Society of American Archivists (see Sites to See below).

Whether you ultimately decide to do it all yourself or to hire a professional, store the collection in-house or donate it to a library, begin your research with two Council resources on archiving—"Taming the Beast of Overload," by Tami Bradley and Susan G. Fowler, an article on managing foundations' information and knowledge management resources, which appeared in the July/August 2001 issue of *Foundation News & Commentary*, and *The Family Advisor: Archiving Your Family History*. Included in *The Family Advisor* are lists: books and publications on all aspects of archiving family histories, Internet guides and genealogy home pages, organizations that specialize in records management and compiling histories, archival supply companies and recently published family histories. As well, there are seven short articles on various aspects of foundation archiving, specifically aimed at family foundations. For ordering information, see the entry for *The Family Advisor* in On the Bookshelf, page 6.

## Sites to See

### Storytelling Sites

National Storytelling Network

[www.storynet.org](http://www.storynet.org)

International Storytelling Center

[www.storytellingfoundation.net](http://www.storytellingfoundation.net)

### Special Collections and Archives

Indiana University-Purdue University Indianapolis (IUPUI)

[www.ulib.iupui.edu/special](http://www.ulib.iupui.edu/special)

The American Association for State and Local History

[www.aaslh.org](http://www.aaslh.org)

Rockefeller Archive Center

[www.rockefeller.edu/archive.ctr](http://www.rockefeller.edu/archive.ctr)

The Society of American Archivists

[www.archivists.org](http://www.archivists.org)



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## Defining Donor Intent

*Donor intent* refers to the charitable giving actions, legacy and intentions of the original donor (also called *founder*) of a foundation. Defining and drafting a statement of donor intent can be difficult. Not only must donors determine—and describe—the values they wish to impart through the foundation, but they also must think about how these values will endure in the future, after they have died.

If the donors do not communicate these values while they are living, board members are left with no choice but to infer intent—not an easy task. At times, a board may wonder if they are following the donor's wishes.

For Margaret Riecker, president of the Harry A. and Margaret D. Towsley Foundation, passing on the donor's values to the third and fourth generations proved difficult. "We had to rely on word of mouth, informal discussions and board retreats to share the donor's interests and intentions for the foundation's giving. I urge all donors to develop an oral history on video or some other method to guide future generations of trustees."

For sample donor intent letters, contact the Council on Foundations Family Foundation Services at 202/467-0407 or [family@cof.org](mailto:family@cof.org).

### ON THE BOOKSHELF

***The Family Advisor: Archiving Your Family History.*** (Washington, DC: Council on Foundations). This information packet, FREE to Council members, contains essays, articles and guides on establishing foundation archives as well as samples of foundation histories. For a copy, contact 202/467-0407 or [family@cof.org](mailto:family@cof.org).

***Family Tales, Family Wisdom.*** Akeret, Robert. (New York, NY: William Morrow and Company, 1991). A thoughtful approach to gathering and sharing family stories.

***Donor Intent: Interpreting the Founder's Vision.*** (Washington, DC: The Philanthropy Roundtable, 1993). To order, call 202/822-8333 or [www.philanthropyroundtable.org](http://www.philanthropyroundtable.org). "Two essays discuss the parallels between constitutional interpretations of donors' intentions and how best to enforce donor intent."

***Keeping Family Stories Alive.*** Rosenbluth, Vera. (Vancouver, BC: Hartley and Marks Publishers, 1990). Get details on gathering and saving family information to establish a lasting legacy.

***Living the Legacy: The Values of a Family's Philanthropy Across Generations.*** (Washington, DC: National Center for Family Philanthropy, 2001). 169 pages, \$45. To order, call 202/293-3424 or visit [www.ncfp.org](http://www.ncfp.org). "A testament to how the values of a family's philanthropy across generations can be a powerful living legacy."

***The Power of Personal Storytelling: Spinning Tales to Connect with Others.*** Macguire, Jack. (New York, NY: Jeremy Tarcher/Putnam, 1998). "Mine your memories to better communicate, enhance relationships and understand yourself better to better understand others."

***Telling Your Own Stories.*** Davis, Donald. (Little Rock, AR: August House, 1993). From simple directions and prompts, find a starting place to tell your family's story.

## How your foundation can tell its story

- Donor intent letters
- Video interviews
- Oral histories
- Annual reports
- Foundation archives
- Family newsletters
- Family trees
- Autobiographies/Biographies
- Storytelling circles
- Websites



## What's New at the Council?

### Call for Nominations—Robert W. Scrivner Award

The Robert W. Scrivner Award for Creative Grantmaking honors grantmakers who, with a combination of vision, principle and personal commitment, are making a critical difference in a creative way. Council members may submit nominations by January 10, 2003. Those eligible to receive the award include individuals from foundations and corporate giving programs that are members of the Council on Foundations or a regional association of grantmakers. For nominating materials, contact Camille Tilley-Mayfield at 202/467-0409 or [tillc@cof.org](mailto:tillc@cof.org), or visit [www.cof.org/newsroom/awards/RWSAward/index.htm](http://www.cof.org/newsroom/awards/RWSAward/index.htm).

### Call for Nominations—Paul Ylvisaker Award

The Paul Ylvisaker Award for Public Policy Engagement honors a foundation that has demonstrated excellence in affecting public policy by using creative and effective strategies. Council members may submit nominations by January 17, 2003. For nominating materials or further

information, contact Katie Lamb at 202/467-0429 or [lambk@cof.org](mailto:lambk@cof.org), or visit [www.cof.org/newsroom/awards/ylvisaker/index.htm](http://www.cof.org/newsroom/awards/ylvisaker/index.htm).

### Council Pushes for IRS Ruling on Private Foundations Terminating

The U.S. Department of the Treasury has released Rev. Ruling 2002-28 to provide guidance on how to terminate a private foundation. "The Council on Foundations and the American Bar Association have pushed for this guidance on how to terminate private foundations correctly—to avoid penalty taxes under section 507," said Council Senior Vice President and General Counsel John A. Edie. Unfortunately, the ruling did not include guidance on how to terminate into a public charity or community foundation. The Council plans to communicate further with the IRS and Treasury on that point. To access Rev. Ruling 2002-28, which was released May 1, visit [www.irs.gov/pub/irs-irbs/irb02-20.pdf](http://www.irs.gov/pub/irs-irbs/irb02-20.pdf). (The ruling begins on page 24.)

## Updated Principles and Practices

After two years of thorough review, the Council on Foundations' Board of Directors has completed its revision of the Council's Recommended Statement on Principles and Practices for Effective Grantmaking. This revision marks the first change in the statement since its adoption in 1980.

The Principles and Practices statement is an important priority of membership in the Council on Foundations, since Council members subscribe to these principles as a condition of their membership. The statement sets forth well-recognized ideals for good practice that each member supports and is working to achieve.

An early draft of this revision was mailed to Council members in February 2002 to solicit comments and suggestions. The draft was featured at Council conferences and reviewed by many Council committees. After close review of the many suggestions provided by members, the board of directors approved the final revision on June 25, 2002.

To review the revised statement, log onto [www.cof.org/resources/prinprac.htm](http://www.cof.org/resources/prinprac.htm).

## Wanted: Experience and Insight

The Council's revised Principles and Practices statement provides guidance for all of organized philanthropy. The Family Foundation Services Department needs volunteers for a focus group on best practices for family foundations. If you are interested in participating, please contact Karen Green by e-mail at [greek@cof.org](mailto:greek@cof.org) or by phone at 202/467-0428.



# Coming this December...

## 1 Location

## 2 Institutes

## 3 Networking Events

**Institute for New Board Members** (December 10)

**Institute for New Grantmakers** (December 11–13)

Washington, DC

- Foundation staff and trustees—strengthen your grants management skills by participating in one or both of these Institutes.
- Learn the principles and best practices of grantmaking, broaden your knowledge of philanthropy and expand your network of colleagues.
- Join a wide range of faculty as you learn the dynamics, culture and values of the field.
- Come away with essential grantmaking and skill-building tools to enhance your foundation work.

Contact [education@cof.org](mailto:education@cof.org) or call 202/467-0423 for more details.  
For more information on the Institutes, visit [www.cof.org/conferences](http://www.cof.org/conferences).



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