



The  
Dallas  
Foundation

# Family Philanthropy: **Philanthropy by Design**



# The Dallas Foundation partners with individuals, couples and families to help them find the joy, purpose, and meaning of **giving together**.

**Giving together** as a family can be an uplifting, rewarding experience. But it also takes some planning. Even the most philanthropically inclined families must think about when, to whom, how, and how much to give. Whether your family consists of two or twenty, one generation or several, The Dallas Foundation can design a suite of family-focused services tailored to your unique situation. Let us help guide the conversations, help you identify values and priorities and, ultimately, impact the causes you care most about.

Our team of philanthropic advisors are trained to listen and navigate each family's specific needs, from establishing a philanthropic focus to meeting with entire families and their professional advisors. We provide resources, expertise and support to transform your values into effective giving that makes a lasting impact on the causes most important to you. How much support and guidance you want is up to you – and your family – to decide.

As a valued member of The Dallas Foundation, you will be invited to participate in our ongoing donor engagement opportunities including special events to learn about the community needs, effective philanthropy, and our strategic initiatives to support Greater Dallas.

## Contact Us

For more information about Family Philanthropy, contact:



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## Family Spotlight: Ralph Santos & Rebecca Hurley

**Ralph and Becky** had been searching for ways to be more proactive with their charitable giving and to involve their children and grandchildren in their philanthropy. Intrigued by the flexibility of a donor advised fund, they met with The Dallas Foundation and discovered the many robust programs and services offered.

In addition to helping Ralph and Becky establish their fund, Foundation advisors facilitated a workshop during which Ralph and Becky and their adult children engaged in exercises designed to articulate the family's motivations, shared values and areas of philanthropic interest. Since then, The Dallas Foundation has been instrumental in assisting the family in identifying organizations whose missions align with these values and that provide opportunities for communicating the family's shared values to the grandchildren, from toddlers to teens. "By intentionally focusing on philanthropy as a family, we've been able to identify our common charitable interests and deepen relationships among and across generations."

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Now, philanthropy has become a family affair. Each year, the adult family members hold a retreat to discuss and allocate gifts from the donor advised fund. Each couple is encouraged to suggest charities they have supported. At holiday time, Ralph and Becky purchase small charity gift cards for each of the grandchildren to make gifts to charities that they select. Through these activities, the family has gained a greater awareness of both the needs of the community and the efforts by The Dallas Foundation and other organizations to address those needs.

# Your family's philanthropic journey **starts here.**

We define family philanthropy as two or more people connected through special relationships and focused on making an impact in areas most meaningful to them.

The Dallas Foundation offers the following family-focused services designed to span generations.



## **Mission & Value Statements**

Having a family giving statement is an important part of your philanthropic identity. It can serve as a guide when considering which causes or organizations to fund and determining the impact you want to have, today and tomorrow. Our team incorporates tools designed to help you create your unique mission and values statements which serve as the foundation of an effective giving strategy.



## **Strategic Planning**

How can families develop and implement a strategy that achieves impact and reflects the family's vision and values? Our team can guide these conversations, help identify goals, articulate a purpose, and develop a giving plan reflective of your family's common interests and priorities.



## **Annual or Semi-annual Meetings**

Our team is trained to facilitate meetings monthly, quarterly or annually, as the family wishes, to provide direction and serve as a measure of accountability. Each meeting is tailored toward the goals and giving strategy adopted by the family. These meetings can take place at your home, office, or at The Dallas Foundation's office.



## **Nonprofit Research & Grantmaking Evaluation**

When your family wants to learn how and where you can do the most good, our team can help. In addition to our own robust database and grantmaking expertise, we constantly monitor the nonprofit landscape to understand who is making an impact and where resources are most needed. For those who prefer on-site research, our team can arrange family or group site visits to agencies of interest.



## **Evaluation and Grantmaking**

Whether your family is starting with a blank slate, has ideas about which organization(s) to support, or has a legacy of philanthropic giving, The Dallas Foundation's team of advisors can evaluate the effectiveness of your charitable investments and make recommendations for additional ways to make an impact on the causes your family cares most about.



## **Volunteer Opportunities**

Volunteering as a family allows you to experience first-hand the mission and impact of organizations that align with your values. Our team has in-depth knowledge of the Greater Dallas nonprofit landscape and can help identify volunteer opportunities or service projects for all age ranges that fulfill your charitable goals.

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Family Philanthropy is an easy and natural way to open the discussion with the Next Generation on family values, inherited wealth, family legacy and succession.”

**National Center for Family Philanthropy**

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Our family needed to have important conversations about the future of our foundation and the involvement of the next generation. We would not have known how to have these conversations without the guidance of The Dallas Foundation. As a result of our engagement with the Foundation, we now have a clear path forward allowing us to refine our focus, increase our impact in the community and leave a charitable legacy reflective of our family values.”

**Dick McMillan**  
L & M Foundation



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