



Next-gen philanthropy is about more than just giving away money

Strengthening Family Bonds

Facilitating Family Continuity

Inspiring Personal Growth

Philanthropy is about helping others, offering invaluable funding to support communities and causes. When family foundations are involved, it gets more complex than simply giving money away. It's also about preserving a legacy and bringing family members together in the name of a shared cause or purpose. The style and look of a family foundation has evolved, and it's important to consider how to engage the next generation.

Junior boards—also called associate boards—can be a powerful philanthropy services tool in helping prime the next generation, and they can be highly personalized in structure, style and purpose. They can be as small as four members, or as large as 20, and the age limitations can be anywhere from pre-teen to mid-30s. These launch pads are instrumental in not only growing the foundation's reach but also growing the junior board members as individuals.

“Junior boards help teach the next generation about the foundation and its mission, how it's structured and more. It's a good way to strengthen members' financial literacy skills. It helps them learn about the value of money, investing the foundation's assets, learning about the stock market and the power of leaving your money invested so it grows over time,” says Alexandra C. Repko, officer and client advisor for Whittier Trust's Philanthropic Services. Junior boards can also help strengthen familial ties, prepare members to transition to the main board and help members discover more about themselves. Here's how.

Strengthening Family Bonds

Junior boards can help strengthen a family's bond, especially if there are many branches or if the members aren't particularly physically or emotionally close. “It's a good way for cousins or more distant relatives to be able to collaborate and decide how and where the money should go,” says Repko, who adds that working together is helpful in making junior board members feel less alone in their giving.

Even close-knit junior boards can deepen their relationship. She recalls one example of a small but well-run junior board that had been working together for many years. Whittier Trust facilitated a connection presentation for them to share during a family retreat, where each member worked with the firm to share more about their choice of organization to support.

“We created a presentation for them to give to each other on the junior board and the greater family. It was during the pandemic so it was over Zoom, but it worked really well. They were able to share with each other, to present their interests and why they chose to give to particular organizations,” she says, noting that the environment made it conducive for creating deeper connections.

“Sometimes, even though you're family, you don't always take the time to listen and hear about each other's interests,” she says. “It strengthened family ties in a natural, organic way.”

Facilitating Family Continuity

Succession is a challenge family foundations often face, so establishing a well-functioning junior board can help smooth the transition to the main board. “Junior boards can promote family continuity,” explains Repko.

It also helps get family members invested earlier, which can also be its own challenge, depending on the level of excitement a junior board member has for the role. That's where Whittier Trust comes in. “Part of our role is to get the junior board excited,” says Repko, whose team does this by showing interest in junior members as individuals, having strategic conversations and doing site visits to grantees so they can see first-hand the impact they're having.

Conversely, some junior board members are exuberant and need help focusing their interests and refining their strategies. Whittier Trust steps in and supports them by guiding them through questions to help figure out values to create a common purpose.

Repko recalls one junior board of preteens who were so excited to be participating, but they hadn't yet identified a mission. Whittier Trust got them together and used a core values game to help. “We identified not only the family's core values, but their individual values as well,” she says. “When they're really enthusiastic it's easier for them to inspire their cousins and other family members.” Getting them involved in the process in the right way at the right time can help fuel a lifelong passion for the family foundation. It can be particularly special to have a junior board because many will have parents on the main board, providing opportunities for bonding and working together.

Inspiring Personal Growth

Repko's favorite aspect of her job is watching junior board members grow. “They're able to find out more about themselves and their core values. It's one of the most beautiful parts—sometimes they think they're just supporting a charity in their community, but they eventually realize that they have a passion for the environment, or helping women or underserved kids, for example,” she says. “They walk away with a better idea of who they are and what they want to do to make a positive impact in the world. They learn that grantmaking isn't just a transaction—ideally, it's a relationship.” The impact of personal growth on a family foundation, especially as it concerns giving, is immeasurable.

Whittier Trust helps create, manage and evolve junior boards, tailoring their recommendations and plans to a family's philanthropic mission and grantmaking style, while simultaneously helping them find their own philanthropic voice. "As the next generation moves up, there will be new trends. Junior boards today have different interests compared to their grandparents. And we're able to welcome and support their new ideas," says Repko.

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