



How Southern Millennial Philanthropists Are Increasing Engagement

By Betsey Russell

Think of millennial philanthropists and you may instantly picture tech royalty like Mark Zuckerberg and Priscilla Chan, Pierre and Pam Omidyar, or Sean Parker, who are very publicly pushing traditional forms of philanthropy aside in favor of new approaches.

For Zuckerberg and Chan, it's an LLC designed for impact investing. For Parker, it's forgoing support to established research centers to create cancer and allergy research "dream teams." These adventurous approaches to philanthropy aren't surprising, given the entrepreneurial nature that created the fortunes that are being put to use. And their questioning of traditional philanthropic practice has drawn both cheers and jeers from the rest of the field.

But this type of "extreme philanthropy" is the exception rather than the norm. In fact, most millennial philanthropists aren't packing billions and are taking a more studied and subtle approach to change. This is especially true in the South, where most millennial philanthropic assets are part of a family legacy.

The biggest and best news is that millennial generations are participating in philanthropy like never before, said Ginny Esposito, president of the National Center for Family Philanthropy.

"There was a time in this field where the norm was that if you hadn't engaged a younger person by age 18, you just had to give up until they were in their 30s, because they were focused on their own careers, education and marriages and families," she said. "That's not true anymore. Younger generations are now seeing philanthropic activities as part of their personal development, not an add-on."

Another trend in the South is that as younger generations engage, they tend to honor both traditional forms of family giving and simultaneously find ways to try new things as well. In some cases, millennial family members are serving on family foundation boards earlier. Those from larger families, where a multitude of

cousins may preclude board service anytime soon, engage instead through volunteering, advocacy and building relationships with local nonprofits as organizers, consultants or even employees.

Part of the willingness to incorporate traditional forms of family philanthropy into the millennial approach may be because of the willingness of older generations to make room for new ideas and encourage them. Esposito noted that many families she's worked with in the South have made an effort not to simply accommodate differences in perspective, but to create a shared set of values that respects the past and embraces the future.

There is also a shared understanding that in some situations, those shared values will accommodate new approaches within a foundation and, in others, will support the younger generation's pursuit of efforts outside of the foundation but still in tandem with its values.

Dehler Hart, a fourth-generation board member of the Springs Close Foundation in Fort Mill, South Carolina, sees this expansion of family values among his 26 cousins who are now spread far and wide across the country.

"Only a few of us have served on the foundation board, but others are engaging in social improvement work in a number of ways, from youth counseling to working as public defenders," he said. "We are all living the values we got from our parents and from the foundation over the past 40 years or so."

For Tamara Davis, a fourth-generation trustee of the Arthur Vining Davis Foundations in Jacksonville, Florida, serving on the foundation board sparked an interest in doing more outside the family's philanthropy.

"After joining this board and seeing what it was like, I joined two other local boards in my home community so I can stay engaged there and build my experience," she said. "The Arthur Vining Davis Foundations have a relatively broad focus, so it's nice to focus on some of the same issues we fund nationally in a more focused, local way."

Leveraging Tradition

Esposito points out that millennial philanthropists in the South have an asset that can be greater than the gazillions of dollars that power the giving of tech entrepreneurs – a family name.

"The South is home to some of the best family philanthropies in the world, and that's been a constant for generations," she said. "Younger generations in these families understand why philanthropy is important, what has been accomplished, how lives have been enriched. The younger South also has a real respect for their families and what they've done, even if they don't always agree with the process or focus."

Wearing and applying a family name isn't always easy. Some younger generations struggle with what a name means and how people respond to them because of it. But others understand the power of a philanthropic name and how to leverage it for community good.

"The younger generation recognizes that the family name is a valuable non-cash asset," Esposito said. "They can use that identity to help accomplish good things."

A family name also can foster generations of trust, said Hart.

“It’s instant credibility. There is historic distrust between some communities of different races, and distrust among charities within those communities of outside funders who come in telling them how things should be done,” he said. “That’s instantly overcome by a local name.”

Davis agreed that legacy is very powerful.

“We’re not famous people, but we do have a very good history, which allows us to reach out to others to combine efforts, she said. Because of our legacy, we’re more trusted as a potential partner.”

Because of family giving traditions and engagement, family foundation millennials also understand how the nonprofit sector works, said Esposito. That’s something many newly-wealthy tech entrepreneurs don’t necessarily understand. Take Zuckerberg’s ill-fated and highly-criticized cash dump into Newark, New Jersey, schools, for example. That’s a mistake that most next-gen family members can avoid.

“They have that deeper understanding of the system – what works and what doesn’t,” said Esposito.

“Billionaire philanthropists will make huge changes on a world scale because of the amount of money they bring to the table, but that doesn’t do anything for an unemployed textile worker in Chester, South Carolina, or a family struggling with poverty in Fort Mill,” said Hart. “Many of our charities aren’t set up for national grants, and our philanthropy can help the neediest in a quick time frame.”

Maintaining Momentum

What can younger and older generations of philanthropists do to keep the millennial momentum going? Esposito offers the following advice:

To young people – understand what motivates and inspires you. Spend some time thinking about what outrages you, then be willing to ask questions and learn. Interview mentors, nonprofit leaders and other family members.

“Philanthropy should always be an ongoing learning opportunity – about your community, your organization, your family and yourself,” said Esposito. “You’ll end up with a deeper commitment to what you care about and deeper respect for others. Ultimately you’ll end up empowered to make the change you want to see.”

Esposito urges parents, aunts, uncles and grandparents to understand what it means to work with your family. Talk to your children as early as possible about what your family’s philanthropy is, why you do it, why it’s important to you personally and to the family. Some families have asked community leaders to dinner to expose younger generations to their work and ideas.

Also, encourage younger generations in their own interests.

“Don’t try to create little clones,” Esposito cautioned. “The successful transfer of philanthropic values happens when you encourage young people in their own engagement. This



Johnathan Hill (left) is one of many members of the millennial generation who are becoming more involved in philanthropy. He attended SECF’s 2016 Family Foundations Forum with his aunt, Mary David (right), a trustee of the Benjamin & Frances David Foundation in Vestavia, Alabama.

tells them they are important to the community not because of the family name, but because of what they will do as individuals. It also makes it clear that there are some things you’ll do as a family and some that each family member will do on his or her own.”

Davis added that when encouraging engagement among next-gen board members, how one communicates is just as important as what is communicated.

“It can be difficult for them to break away from young families and jobs to participate, so we’re experimenting with things like social media and video conferencing as alternatives to in-person meetings,” she said. “We understand that face-to-face is important, but we can’t be set in stone about it.”

“No other part of the country understands the legacy and the promise of intergenerational philanthropy as much as foundations in the South,” said Esposito. “The richness of the experience is not from the dollars or the personal privilege. It’s from the shared experience, rooted in shared values and vision, and the family enjoying that together.”

Learn More at SECF’s 47th Annual Meeting

How are millennials in our region looking at philanthropy differently? How can you ensure that visions align among generations? Ginny Esposito, president of the National Center for Family Philanthropy, will be joined by Elizabeth Carlock Phillips, executive director of the Phillips Foundation, for *Taking the Reins: A Millennial Generation Asserts Itself in Philanthropy*, at 10:15 am on Thursday, November 10, during SECF’s Annual Meeting.

For more details, please visit secf.org.

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