

Steve Gunderson
2011 Family Philanthropy Conference
January 25, 2011

Good Morning.

I'd like to begin with some words of appreciation.

Sharna Goldseker has invested the vision of a family philanthropist, the creativity of a New York artist, and the passion of a mother caring for her child in the creation of this conference. It is different. It is transformative. And it is an incredible success. We all owe her our deep appreciation, admiration and thanks!

Reginald Jones chairs our Family Philanthropy Committee. Just as he does in his day-job, Reggie combines the vision of the ideal with the pragmatism of the real to lead this work at a time when family foundations are now one of many forms of family philanthropy. I've been honored to work with many committee chairs during my tenure at the Council. But Reggie stands out for his candor, his commitment, and his courage.

We also did something different in planning for this conference. Sharna asked that our leader for family philanthropy services, Dori Krieger, serve as her primary staff liaison. In addition to her normal responsibilities, Dori brought her customary enthusiasm, passion and professionalism to this task.

Many of you who are part of the Council family – from members to staff colleagues – contributed so much to bring us to this place. I want to thank each and every one of you, from the bottom of my heart. But in doing so, I lift up Sharna, Reggie and Dori. Thank you.

Service and Leadership:

Two of my greatest mentors on the role of family philanthropy are Kathleen Odne and Diane Kaplan. We've been privileged to benefit from their skills in so many ways; on many Council Committees and on our Board of Directors. But, it is their personal stories that have written for me the pages of what family foundations can do. Kathleen leads the work of the Leshner Family Foundation in serving their home community in northern California while Diane leads the work of the Rasmuson Foundation in serving the great state of Alaska.

As you know, our conference programming – and especially our plenary sessions – are always over-flowing with content, often crammed into time blocks that must not overlap on the incredible concurrent sessions. Last year, in deference to this challenge I offered to my staff colleagues organizing the Family Conference that “most of you know me and can find me. So, let's just skip a message from the president and CEO of the Council.”

I thought it was a nice gesture. But Kathleen and Diane, both members of our Board at the time, immediately reminded me that this sector looks to the Council for both service and leadership. And, part of leadership is for the President to share their vision through remarks to the conference. It was a good reminder, and I'm honored to have a few minutes to share some thoughts with you this morning.

Today, family philanthropists, family foundations large and small, community foundations, and donor advised funds from 48 of the 50 states are gathered in this room, along with 34 representatives from 10 countries. While each of you brings the passion and purpose of your individual family philanthropy, we are a larger family – the global family, and the human family.

Two weeks ago, President Obama spoke to the nation following the tragedy in Tuscon. As I listened to his remarks that evening I knew we would gather here this week. He talked of building a bridge from the people and the lessons of that tragedy. He said, "That process of reflection, of making sure we align our values with our actions – that, I believe, is what a tragedy like this requires. For those who were harmed, those who were killed – they are part of our family, an American family 300 million strong. We may not have known them personally, but we surely see ourselves in them."

A few days ago, in preparation for this time together, Dori, our Vice President for Programs Kisha Dimbo, and our Director of Education Erica Turner joined me for a conversation about how we at the Council can best align our values with our actions – relating to family philanthropy. It is, a combination of service and leadership; or as Kathleen Odne said a few years ago, "The Council is the organization that provides both sector-wide leadership and sector-specific services."

The foundation of our work remains the Stewardship Principles for Family Foundations. We lift up these aspirational standards for ethics, good governance, transparency, impact and effectiveness. We anchor our educational programming, and our benchmarking data on these key pillars of what "serving the common good" should be in the practice of your family's philanthropy.

But it goes much further. It is in our sector-wide programming crafted with you, the family philanthropist in mind that combines the best of our service and leadership. You have always asked the Council to provide the highest quality legal and legislative services. Today, our six philanthropic attorneys represent the best collection of legal expertise on philanthropic law anywhere in the world. Today, our government relations work is recognized as the voice for philanthropy at the federal level. But, that is not enough. You should know that we are literally doubling our investment of resources in this area in 2011 to enhance our work in ways that will create better policy analysis, better policy communications with you and our policy makers, and better organization of our field work in ways that can achieve a stronger philanthropic voice at this unique time in American history. Part of this work will be the design and delivery of an Advocacy training course designed specifically for family foundations.

Alignment also requires that we are capable of responding to change. Today's family philanthropist seeks new support in new areas. Responding to the growth of family foundations' engagement in global grantmaking, the Council has convened with the EFC and WINGS a two-year Global Philanthropy Leadership Initiative to a.) Break down the legal and regulatory barriers; b.) Enhance opportunities for collaboration in grantmaking; and c.) better define how your foundation can work with multi-lateral NGO's or even governments. This summer, we will convene the first-ever Global Grantmaking Institute to provide you the direct educational services and legal advice for this work.

The recent economic crisis taught us much about fiduciary responsibilities. In response we have created a new set of Investment seminars, along with Best Practices for Investment Management. We have also created a new set of programming for Trustees and CEO's, ranging from "Standards of Excellence for Trustees" to a wide range of CEO offerings, including the very high-level CEO Retreat, scheduled for this May right here in New York at the Pocantico.

The Council also takes incredible pride in our new programming on diversity and inclusion. Believing that we can prevent mandates with high-quality voluntary leadership, the Council has developed many programs to support the field including "Diversity and Family Foundations" or our Career Pathways program advancing new leadership skills.

Our Next Generation work continues to grow. The very popular "Trading Power" is now available both on-line and in hard copy. But most exciting, we are now using this publication to create online leadership assessment tools for CEOs and trustees.

Looking Forward

We are building many bridges at this conference. For me, probably the most important bridge is to the future. In 2011, we must – as a greater philanthropic family – ask the question, "What is the role of philanthropy at a time when our governments are both broke and broken?" That is a longer subject than we have time for this morning.

But, this we do know:

- Family philanthropy, and all philanthropy, is positioned for growth in size, in service, and in the diversity of our giving structures.
- While it is not philanthropy's role to replace government, the demands on philanthropy to do more in our communities or our areas of passion will continue to grow. The independence and innovation of our strategic investments in positive social change must rise to a new level of service and leadership.
- At a time of less government resources and perhaps less government regulation, our conduct is more important than ever. While today's Stewardship Principles are aspirational, some of you have inquired whether the Council would consider creating certifiable standards sometime in the future. For now, we will begin working with you to redesign and re-launch our Principles for Family Foundations.
- The Council's role is to become a center of excellence in the design of programming that serves the growth and diversity of philanthropy. Our role is to align the common

standards which unites all of us – different forms of family philanthropy; different forms of philanthropy; different regions of the country or world; and different areas of work.

- But this focus must also be built upon partnership and efficiency. Colleague organizations often bring a depth or experience to this work that must be lifted up. Regional associations continue to provide more direct education delivery than the Council could ever match. There is simply too much to do, and too few resources to spend our time in competition when we should invest in excellence, expertise and collaboration.

In Summary

The Council's Board of Directors got it right when they approved our current business plan lifting up five key priorities for our work that properly define the unique role – and dare I say our appropriate competitive advantage – in serving this incredible field. As my recent letter to the field stated, the Council's service and leadership will be organized around the following five priorities:

1. To Promote Philanthropy
2. To Ensure Essential Service Delivery
3. To Help Increase the infrastructure's Collective Impact
4. To Support Foundation Leaders
5. While building a strong organization to serve you best.

In closing, I am reminded that of all our annual conferences this one is often the most poignant for me. For it is when we gather our family philanthropists and I see the incredible legacy you are creating in your individual work that I am again reminded of my personal family – our roots, our values, and hopefully our legacy.

As a child growing up in rural Wisconsin, one of my favorite poems remains so appropriate for this gathering, this conference, this city, and the theme for this year's conference. Allow me then to close with these words written by Will Allen Dromgoole:

*An old man, going a lone highway,
Came, at the evening, cold and gray,
To a chasm, vast, and deep, and wide,
Through which was flowing a sullen tide.*

*The old man crossed in the twilight dim;
The sullen stream had no fear for him;
But he turned, when safe on the other side,
And built a bridge to span the tide.*

*“Old man,” said a fellow pilgrim, near,
“You are wasting strength with building here;
Your journey will end with the ending day;
You never again will pass this way:
You’ve crossed the chasm, deep and wide—
Why build you this bridge at the even tide?”*

*The builder lifted his old gray head:
“Good friend, in the path I have come,” he said,
“There followeth after me today,
A youth, whose feet must pass this way.*

*This chasm, that has been naught to me,
To that fair-haired youth may a pitfall be.
He, too, must cross in the twilight dim;
Good friend, I am building this bridge for him.”*

You, my friends, are today’s bridge builders. In this challenging and complex world, we recognize the many pitfalls before the youth of our families, our communities, our nation and our world.

It is my fondest hope that this incredible conference, combined with the week-in-and-week-out services we provide to you in support of your noble work may equip you to a new era of bridge building.

Thanks for who you are and all that you do. For me, it remains an incredible professional honor and personal privilege to walk these bridges with you.