



Private Foundation Organizing~ Values Based Mission Case Study

Highlighted Results

*Deeper understanding
and appreciation for
family giving interests*



Reduced family tension



*Single new shared
vision & mission*



*Energized family
foundation board*

Featured Project

A family patriarch passes leadership on to adult children with reinvigorated foundation mission.

The Challenge

The client was a successful businessman who always placed family first among his priorities. A family foundation had been formed some years ago, and the founder determined it was time to ask the adult children to assume leadership. During the leadership recruitment, it became apparent that the next generation was unclear of the mission, inadvertently creating tension and role confusion among these loving family members.

The founder's desire to protect the family relationships above all else caused him to proactively reach out to The Legacy Group for consultation on effectively navigating these uncharted waters. The solution was to re-energize the family board, and rebuild a cohesive and clear mission and governance structure to support it.

The Legacy Group Execution

- Mapped the giving intention of the founder and each family board member, analyzing to find common ground
- Established a refined and clear mission based on this common ground
- Instructed board on execution strategies for the new mission
- Reorganized governance structure for greater proactive family involvement
- Recruited next president from within family board
- Planned and guided first board meeting following reorganization

The Legacy Group Impact

- Each family member gained deeper understanding of his or her own giving passions and appreciation for each other's giving interests
- Tensions reduced as roles and expectations were clarified
- Together, the family captured a single new vision leading to a truly shared mission for their giving
- The family foundation's board was energized with next generation leadership, confident and ready to engage
- Family joy reinvigorated around the foundation's giving