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### WEALTH MATTERS

# *Learning to Bridge a Generation Gap in Philanthropy*

By Joanne Kaufman

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A decade ago, shortly before their daughter, Caitlin Heising, started her freshman year at Brown University, Liz Simons, a former teacher, and her husband, Mark Heising, the founder of an investment firm, established the Heising-Simons Foundation, a family philanthropy focused initially on education, climate and the physical sciences.

“I’ve always asked a lot of questions and have always been curious about what my parents were working on,” said Ms. Heising, who spent the summer before her sophomore year working at the foundation’s office in Los Altos, Calif. At school, she was ineluctably drawn to courses that dealt with philanthropy, human rights and the role of international nongovernmental organizations.

After graduation, with her parents’ enthusiastic assent, Ms. Heising joined the foundation’s board. “I had brought up the idea, but I don’t think I would have been as excited about it if I didn’t get the sense that they were open to my bringing my own ideas and passions as a board member,” she said. “Not necessarily to come in and shake things up drastically but to come in with new ideas.

One of those new ideas led to the foundation’s budding program in human rights. “It’s smaller than our other programs,” Ms. Heising, 27, said. “But it’s developing, and there’s room to grow.”

She can count on the support of her parents, materially and otherwise. Ms. Simons has accompanied her daughter on Human Rights Watch visits to the San Quentin State Prison and Tijuana, Mexico. “I’ve been really grateful to have the opportunity to work with Caitlin and learn from her,” Ms. Simons said.

It doesn't always go so smoothly. The leaders of family foundations who have spent a lifetime funding things dear to their hearts — the symphony, the botanical garden, arts education, the United Way — often learn that their children and grandchildren have their own ideas and pet causes. And the younger generation may feel that the family patriarch and matriarch are set in their ways and turn a deaf ear to other input.

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There are a lot of dollars at stake. A 2014 report by the Center on Wealth and Philanthropy at Boston College estimated that \$59 trillion would be transferred to the next generation from 2007 to 2061. Lifetime giving to charity in that same period is pegged at \$20.6 trillion.

It used to be that the philanthropic baton would be passed to the next generation when the parents died. In the past, fewer generations actively worked together.

But with longer life spans, “there are several generations in the philanthropic space at the same time and around the table at the same time,” said Sharna Goldseker, the founder and managing director of 21/64, a consulting firm that focuses on next-generation philanthropy. There may well be agreement among the generations about the importance of giving, but also disagreement about who to give to and how to give it.

“The expression of a different philanthropic interest is a balancing act for the next generation,” Ms. Goldseker said. “How do they honor their legacy and deal with what they see as the needs of today?”

That the younger generation might not share the older generation's ideas about giving, that they might want to focus on different causes makes perfect sense, said Michael Moody, who holds the Frey Foundation Chair for Family Philanthropy at Grand Valley State University in Grand Rapids, Mich. After all, they grew up at a different time in a different world. “The emergence of environmentalism in the '60s, civil rights and the women's movement meant that the younger generation was more interested in giving to them rather than to the Junior League,” he said.

Geography also plays a role. If, for example, the foundation is focused on the local community “and the family is far-flung, it will be hard to get the next generation engaged,” said Professor Moody, an author, with Ms. Goldseker, of the book “Generation Impact: How Next Gen Donors Are Revolutionizing Giving,” expected in October.

It could also come down to that most basic of explanations: different strokes for different folks.

“Individuals have different interests, and individuals within families have different interests,” said Tracy Mack Parker, chief executive of the Philanthropy Workshop.

“Sometimes, the younger generation steps up early and wants to get involved and do research and put in the time. It can also be the case the younger generation is too busy raising families and building their own careers, and it’s a challenge for the first generation to respectfully get the younger generation involved and participating.”

“What we try to do,” she said, “is to encourage families to identify certain core values that could cut across all the philanthropic work they do and come up with a vision for a world they want to see.”

Unfortunately, in some instances, there’s a dominant wealth creator “who is confident that he or she knows where the money should go and isn’t questioning it very much,” Ms. Parker said. “If members of the next generation with different ideas feel they’re butting up against a wall, they’ll work on their own giving rather than participating in the family giving.”

In a growing trend, those strong-minded wealth creators may decide to spend the foundation’s resources in their lifetime so they can see the impact while they’re alive.

Discretionary funds are a useful option when consensus is hard to come by. “They allow individual family members to give to their pet organizations,” Mr. Moody said.

Sometimes the answer is multiple funds or foundations. In 2004, Roxanne Quimby, a founder of the personal care company Burt’s Bees, created the Quimby Family Foundation, encouraging the involvement of her adult children Hannah Quimby and Lucas St. Clair.

“My mother engaged with us in an open, flexible way, making sure from the get-go that the focus of the foundation was something we cared about,” said Hannah Quimby, 38. Together, they settled on two broad areas for their philanthropy: arts and the environment.

Subsequently, Mr. St. Clair became more involved in another of his mother’s philanthropic endeavors — a foundation to create a national monument in Maine, the family’s home — and Hannah Quimby became increasingly engaged with the family foundation.

“What happened with time is that I crafted our mission to be a little more focused,” she said. “My mom let me do that and then she said: ‘You know what? I want to fund the arts and I want to run things the way I want to run them, and I don’t want to read a ton of grant applications,’ so she created a third foundation.”

Frequently, the differences in giving are more about style than substance. The next generation may be as dedicated as their parents about contributing to their alma mater. “But the older generation may write a check and have a building named after them,” Professor Moody said.

The younger generation, which tends to be more hands-on, “will want to write a check to create a scholarship for minority students and then become a mentor and engage with the student who is receiving the scholarship,” he said.

But even when the causes are different, there may be considerably more generational overlap than first meets the eye. Ms. Goldseker of 21/64 recalled a patriarch who was setting up a foundation to finance local scholarships as a way to give back to the community where he had earned his wealth. His grandchildren, to his frustration, were interested in making microcredit loans to people in developing countries.

Ms. Goldseker handed the grandfather and grandchildren sets of 25 cards, each marked with words like “integrity,” “justice,” “opportunity,” “compassion” and “self-reliance,” and asked them to prioritize the values that animated their philanthropic decision-making.

“When they showed their cards, all of them had ‘opportunity’ on the top, and I think the grandfather was very struck by how his values had been transmitted to the next generation,” Ms. Goldseker said. “The grandchildren had internalized those values, but they were applying them in a different way because they’d grown up in a different world in a different time.

“He’d wanted to create opportunities by creating scholarships in his community, and now he realized that offering microloans was creating opportunities for people in Africa.”

Ms. Simons of the Heising-Simons Foundation found a similar link between her focus on early childhood education and her daughter’s human rights advocacy. “Children who have this experience are less likely to go to jail and less likely to have the problems of those who didn’t have the benefit of early learning.”

She added: “As I’ve thought about this, I’ve seen the connection with Caitlin. Education is a human right.”

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