

# How and Now Matter: Reflections from the 2022 National Forum on Family Philanthropy



NATIONAL CENTER FOR  
FAMILY PHILANTHROPY

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Every two years the family philanthropy community gathers for reflection and inspiration at the National Forum for Family Philanthropy. San Francisco hosted our latest summit a few short weeks ago—marking the 25th anniversary of the organization and the first in-person event since the onset of the COVID-19 pandemic. The event brought into focus the moment of shift we are experiencing and the possibilities of a more equitable and effective philanthropic sector.

Three years ago I accepted the President and CEO position of the National Center for Family Philanthropy with one condition in mind: that I challenge myself and the field of family philanthropy each and every day. What I didn't know—what none of us knew—is that the world would test our strength, our commitment, our purpose, and our resolve in the most unthinkable and unexpected fashion. We've all been asked to reflect on our most fundamental truths and beliefs, to consider the unthinkable, handle the unmanageable, and move forward in spite of our fears. Yet one question remains central to the struggles of so many over the recent months and years: ***will we rise?***

The theme of the National Forum centered on the idea that **how and now matter**. We invited attendees to embrace a shared definition of effectiveness—one that is rooted in equity, accountability, relationships, and a commitment to ongoing learning and reflection. As you read through the topline reflections from the event, we invite you to recognize the power and possibility we control and challenge each other with new ideas and approaches. Now is the time to act.

**“Wealth is multigenerational but so is poverty. And that means history matters.” – Edgar Villanueva**

For family philanthropy to be effective, equity must be woven into practices and policies and diverse perspectives must be prioritized. Edgar Villanueva, founder of the Decolonizing Wealth Project, summed up this tenet of effective family philanthropy by reminding us of the historical inequities underpinning our field. How are we gaining a deeper understanding of the problems we seek to address and why they exist in the first place? How well do our staff and board represent the community we serve?

**“If the money came to us in unsound practices, then maybe we owe ourselves a long hard look at the source of that money.” – Abigail Disney**

Accountability underpins dynamics of power, trust, and sustainability. There are few outside institutions holding family philanthropy to its promises. This means the call for accountability needs to come from the family itself. As Abigail Disney emphasized, acknowledging historical inequities surrounding wealth is a starting point that leads to accountability: “Good philanthropy should be structured like a good apology,” Abigail said. Who will make decisions in what settings? How will we document our choices? How can we be transparent with our grantees and community about our work?

**“We need to be humble in our approach, but not modest in our ambition.” – Stephanie Ellis-Smith**

Effective family philanthropy requires us to be humble and responsive. Our time, ideas and dollars help—but we don’t know or have all of the answers. We need expertise and perspective that’s close to the problems we address. How can we be honest about the state of the world around us and how we contribute to it? How are we keeping in mind how much we don’t know and are we listening to those who know more than we do in the community?

**“We have to be more curious about the future than we are proud about the past.” – Crystal Hayling**

Curiosity, continuous inquiry, and the stance that family philanthropy needs to learn to improve is the bedrock of effectiveness. Respect for the work of those that came before you and openness to learning and improving in the future are not mutually exclusive. Legacy can and should be built upon and iterated. How are we reflecting on our purpose over time? Is that purpose also rooted in community need? How are we leveraging sector practices that promote effective outcomes in support of grantees, such as general operating support, multi-year funding, fewer onerous reporting requirements?

**“Listening in the smaller moments, in the quiet moments, and hearing what they need, is really important.” – Tegan Acton**

Family philanthropy is rooted in relationships. Relationships among family members, between family and community, staff, grantees, and stakeholders. These should be marked by empathy, transparency, patience and trust. How are we paying attention to family dynamics and are we willing to have empathetic approaches to hard conversations? How can we create relationships with those closest to the communities and issues we fund?

Thoughtfully and thoroughly practicing effective family philanthropy grounds us in the **how: how** we structure governance, **how** we set strategies and, **how** we establish new practices. I encourage you to reflect on the takeaways we’ve outlined above and take a few specific actions:

**Be flexible.** Move between the comfortable and the challenging. Listen to people who work and think differently from you. Invite challenges to your thinking and remain open to new approaches.

**Be ready.** Commit to and name one new, specific action you’re prepared to take as you continue to reflect on your purpose. That action might be a change to a practice in your governance, or it might be a new grantmaking approach. Write that practice down, and be ready to put it into action with your partners—internally and externally.

**Believe.** Be the person who believes in what’s possible. Name the changes you’re going to make. Believe in the power of your personal change, and especially believe in the power of your collective changes. Believe in the how and now, and recognize the role you must play to make change happen.

Thank you **for your commitment to the how and now.** Individually, none of us can tackle and change the world’s problems. But we each hold the power to determine how and when we act, how we share power, how we consider new ideas, when we put new practices in action, and when we commit to making change happen.

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