



Family

Teach Your Kids

Does your philanthropy involve your family?

Mark and Melinda Norris became Excellence in Giving clients in January 2017. Mark had built a successful business in the oil and gas industry and amassed a large private foundation. Their estate plan would bring even more money into the foundation at the couple's passing.

How to Engage the Next Generation?

Mark and Melinda had experienced the challenge of giving such large sums of money with wisdom. They wanted to prepare their kids to give with equal impact and joy.

The Norris family had met several times about getting the kids involved in the family's philanthropy. They were all in agreement about what to do but didn't know how to do it.

Excellence in Giving was hired to help the Norris's three adult children start making a few gifts of their own. The goal was for each individual to give \$100,000 to a single nonprofit before the next family meeting.

We talked with each of the kids about the social issues, locations, and even the size of nonprofit and type of project they might be interested in.

Excellence in Giving went to work researching opportunities for each family member.

The Solution: A Hands-On Giving Exercise

As Excellence in Giving presented nonprofits to each of the kids, we also included a funding example they could begin to consider getting behind. Excellence in Giving set up site visits and collected due diligence through our Nonprofit Analytics report so the Norrises could have confidence in each organization.

\$1.3 Million | next gen family philanthropy annual giving

Excellence in Giving arranged another family meeting to share the giving opportunities each person selected. It was a chance to celebrate each person's interests and unique approach to change the world around them!

Finally, we followed each nonprofit to track the performance of the gift against benchmarks set. After six months, the Norris family met again to review the progress of each grantee.

Excellence in Giving continues to monitor their giving impact. Through this hands-on process the kids are learning to approach and engage in wise, joyful philanthropy!

“Thank you for bringing efficiencies to the process and making it enjoyable to work on something like this as a family.”

- G2 Client from Houston

