

Season 2, Episode 2: Giving as a Family Affair

Julie: I would still say in your orientation as a family, don't make it about you. There is so much value in making it about all the people that are benefiting from the work.

Grace: Welcome to *Giving Done Right*. A podcast on everything you need to know to make an impact with your charitable giving. I'm Grace Nicolette.

Phil: And I'm Phil Buchanan.

Grace: So today we're thrilled to talk with Julie Aleman, executive director of the Younger Family Fund. Julie has been leading her family's giving since 2016 and her family, her siblings in particular and their families, give together. The Younger Family Fund exists to support outstanding leaders and their nonprofits in order to improve the lives of vulnerable people around the globe. And prior to becoming executive director of the family's fund she spent eight years as a nonprofit fundraiser and was also a consultant at Stanford University's Effective Philanthropy Learning Initiative.

Phil: I really appreciate Julie's openness about the family dynamics that one navigates when giving together with their siblings, about the need to actually trust nonprofits, to trust the people you're trying to help, about what she's learned being on the other side of the table. Really, really interesting conversation.

Grace: Yeah. And oftentimes we hear from donors that they wish they could just sit down with someone and hear the real nuts and bolts of how to get started or, you know, how do you overcome some of these family dynamics? And I think this conversation is full of little stories and nuggets that I'm going to be thinking about for a long time. So I'm excited to dive into this interview.

Phil: Here's Julie.

Grace: Julie, welcome to Giving Done Right

Julie: Thanks for having me.

Grace: So, we're excited to have you on the show because you give very thoughtfully with your family. Could you tell us a little bit about the story about

giving and your grandparents, and also about what you do now with your family's giving?

Julie: Yeah. So when I was young, my grandfather at every Thanksgiving would start sending us a check in the mail for \$25. And he told us at Thanksgiving to try to make someone else's holiday season special and better. And the only requirement was to report back on how we decided to spend it. And I think what was really special about that was, he, at the time had an AOL account and would email out his list of all the cousins and just write our name and then a little blurb about what we gave to, and we could just see what everyone's interests were, which totally ranged from food banks to giving to our church, to buying a toy for somebody, to doing something at an animal shelter. So I think from a pretty young age that just kind of fostered an appreciation for generosity, and I think one insight for me was that it's really easy to give someone else's money away. He and my grandma would always joke about how they wanted their last check to bounce. So they just started kind of giving more through us.

Grace: I love that story. Tell us a bit about what you do now with your family's giving?

Julie: So now I'm the executive director of our family's donor advised fund called the Younger Family Fund, and I'm basically in charge of meeting our goals around finding outstanding leaders that are working with vulnerable populations in a variety of areas. There's healthcare and delivery, education, economic opportunity, justice, and spiritual development.

And we have about 80 organizations that we're funding, but I really focus my time on 40 to 50 of them. And then the second part of what I do is really try to foster family connectedness and using giving together as a way to build our friendships with one another and practice generosity together and also learn about being stewards of funding together.

Grace: I'm sure there are probably upsides and downsides to giving with your family. What are some of the challenges and how do you all make decisions together about where to give?

Julie: Well, I would say one of the biggest challenges for me personally is wearing multiple hats as the executive director and really leading the strategy and direction but also being an equal voting and participating family member and wearing that hat where I want to allow other people to feel space to voice their concerns or what they're excited about and have an equal way of

participating. I have two siblings. I have a twin sister and an older brother and two of us are married. So the five of us participate together.

And I'd say the second that has sort of emerged is our family has really changed over time, not just with growing up and some of us getting married but, for example, my dad and my mom divorced since starting the fund together and now he's remarried. Another piece is—that I don't talk about a lot—but my mom is physically and mentally disabled. So we actually have a participating member in our giving who has her own limitations, but also finds a lot of joy and value in participating.

The last thing I'll say is, my twin sister isn't yet married. So I need to figure out, again, ways to help her feel valued as a single person. When many of us are discussing decisions kind of using "we" language and a lot of our shared experiences have to do with our spouse, so how can we continue to make it inclusive and special for her?

Grace: Hmm. It does seem like you wear a lot of hats. I feel like it's such an ideal, I think, sometimes that folks want to be able to give together, right, with their loved ones. So I'm curious if you have any advice for folks who are just starting out on this journey.

Julie: One of the pieces of advice I have is just, as much as possible, I think, to start practicing generosity early. I think all of us were more willing to get involved because we had that experience with my grandpa and saw the value in that at a young age. We also started giving early together as recent college grads. And I think what really helped us was it was very unstructured. There weren't strings attached and there was a high level of trust and curiosity about what we were interested in. We kind of had free reign to create something on our own that wasn't really prescribed by our parents.

I'd also say just start small. We really had a good 10 years of practicing different things and changing things up and making it work for our group of three to five people.

Grace: And you all take trips together around the giving—tell us more about that.

Julie: Yeah. So that's another piece of advice I'd say is have fun. Don't make it all about business. Back as recent college grads, our first trip, which we named the sibs trip for siblings, we thought it'd be really fun to climb Half Dome together in Yosemite. So we booked a campsite and did an overnight hike, and

we were all in varying levels of being in shape, and it just led to some really hilarious first memories of the three original sibs. But it was probably 90% fun and shared experience and 10% talking about giving—and that worked for us. But we made a weekend out of it, kind of, again, at the encouragement of our parents, to just go and be together and talk about it.

Phil: I keep thinking about all the people I know whose sibling relationships have been torn apart in really tragic ways over money. In families that, like yours, have had this challenge or that challenge, but then rather than coming together in the face of those challenges, the siblings ended up arguing about who gets what. It seems like money and the giving of money has actually been a source of connection and cohesion for you and your siblings that's held you together. But is it also sometimes a source of tension? How would you reflect on that?

Julie: say, for the most part, it has been a source of connection. We've all had our own processing with what it means to be in a family where we are asked to give together and that's taken time. I would say in the last five years in particular, as I've come into more of a formal role within our giving, we've really worked in time to our sibs trips to get to know each other and actually like invest in our relationships with one another beyond making recommendations.

An example of that is, a couple of years ago, I don't know if anyone on the podcast is familiar with the Enneagram, but basically it is very rooted in sort of how you see the world and how your environment and your temperament might have shaped how you interact with really hard things in the world and really good things in the world. Someone else can give a better description, but as some of us got more involved through our churches learning about this, we decided to bring it into our sibs trip, and we hired someone to basically do a one hour conversation/interview with each of us and recommend what they thought our Enneagram type was. And the big question was, how might this influence how we treat one another when we get together and how we interpret each other's interactions, and some of that is conflict. I have very vivid memories of a couple grant recommendations just getting really heated and maybe accidentally tearing some people down because of the passion that was behind that recommendation. So having that, self-awareness and also vulnerability with "Hey, here's how I am. Here's what I resonate with. And I want to share that with all of you, and this is how this might play out." For me, for example, I really don't enjoy conflict. And so when that comes up, I might naturally retreat or try to just have everyone get along and that might play out even more strongly because we actually are siblings and we have a lot of baggage from

growing up together. That's just one example of how we're kind of building in friendship and self-awareness to hopefully get in front of some of the conflict and tension that does arrive when we're talking about giving.

Grace: I'm so struck by just the intentionality in investing in those relationships and how important that is.

Phil: Yeah. And understanding the way you're shaped by your experience, your personal experience, which leads to your professional experience. I don't know that I know of a lot of individual donors who spent some piece of their career as fundraisers. I know of, certainly, plenty of foundation staff who worked kind of on the other side of the table, but you were a fundraiser for a period of time in the nonprofit world. Can you talk to us truly about that experience and whether and how it has influenced your perspective as a donor?

Julie: I was in fundraising for about eight years and toward the end led an integrated capital campaign here in San Francisco for a nonprofit called New Door Ventures and did major gifts, which I actually loved. I know that's unusual, but it has definitely influenced how I run things at the Younger Family Fund and how I try to encourage and foster our approach to giving. I experienced a lot of the bureaucracy when you think of even like grant applications and donor conversations. I experienced a lot of—it felt like busy work and things that were kind of taking away from a more valuable use of time. But then I only ask things that we really read or care about, which seems kind of basic, but it's kind of hard to do. And then I also experienced the—

Phil: Just to interrupt you on that—it may be basic, but I can't tell you how many situations we've seen in which nonprofits are being asked for all kinds of information that when you turn around and ask the foundation or the donor, "what are you using?" They're not using it. And it's just this, all of these transaction costs and no benefit. So that simple question: "how would we use this information? You know, how will it inform us?" And if the answer is: "it wouldn't," then not asking the nonprofit. Like you're saying, it's so simple, but folks don't do it, and there's a lot of wasted time. There's a huge cost associated with that bureaucracy, but I interrupted you.

Julie: No, I think that's exactly right. And so when I got started with our giving, that was definitely a perspective that I held: no busywork, make this as—let's take the burden off the grantees and really only ask what we need in order to make a decision. I also saw the flip side of what I really believe is this sort of like spark or it felt like magic almost of, like, the timing of our ask and encounter with a donor—they were just ready to give. I'm in a position now

where we are ready to give, and it's really, really fun to be able to talk with leaders who are doing incredible work. And they're just looking for that kind of spark and magic moment of having a partner in their work.

Phil: Speaking of being ready to give—you all were very responsive and moved a lot of money rapidly in the wake of the pandemic. Can you talk to us a little bit about how you did that and what sort of guided your decision-making?

Julie: I think, like everybody, COVID came upon us really quickly, and it was shocking to see everything shut down. I live in San Francisco and the rest of our family are just in the Bay Area. Maybe I saw it a little bit more here in San Francisco with just city living. But it was very obvious, you know, with the restaurant shut down on my block and seeing more and more encampments, that the most vulnerable were really getting hit hard with the effects of the pandemic. So it was really easy to kind of say, like, we need to do something.

We, as a family, don't have a local focus necessarily, we give locally, but I think it was a really good reason to just double down on where we live and try to invest in the communities that we care about. I think it really helped to have some other publications go out that were encouraging general operating giving and were encouraging foundations to just kind of pledge to giving more out to those who need it most. And to see also what was helpful for us is there were some local foundations and community foundations, like the San Francisco Foundation and Silicon Valley Community Foundations that were able to identify vulnerable populations and have a method for getting money in their hands. So, I mean, we were thinking about, like, restaurant workers and people who might be undocumented who could easily have been let go but still needed to provide for their families. So how do we get money into their hands?

Grace: Hmm. I'm struck by that because I think it would have been easy to say, "let's see how this shakes out" and kind of take a step back, because it was such an uncertain time and I know at the time it felt like, oh, maybe acting rashly is not the way to go, but I think that in hindsight, you know, looking at the way that your family gave was absolutely needed at the time.

Phil: And can I add to that and say, like, I want to make sure I understand correctly what you did, because it sounds like you did a mix of giving directly to organizations that you knew but you also gave to the community foundation or other intermediaries that were then making the granting decisions. Am I getting that right?

Julie: Yeah. That's exactly right. That is something I wanted to highlight. I didn't go into it thinking I'm gonna to find the best organizations who are working with these people right now. I kind of did as much research as I could from, you know, sitting at a computer and making some phone calls and then trusted other organizations who I knew were well-respected and recommended in their different areas of working with basic needs. Another example is Give Directly, they did a special COVID grant round, and they were finding single moms who needed cash nationally. And so we gave to that fund for example, and they had their own process for it. But I think we were also just really leaning toward cash grants and knowing how important that would be in those coming months. And the last thing I'll say with that is just, I do really believe having a donor advised fund helped us. I know that they're getting a lot of critique right now, but it truly is incredibly easy to move money out of the donor advised fund. And I could do it within minutes once we made those decisions and that was also an important part of all of it.

Phil: Julie, you're talking a lot about trust, and there are various levels of that trust. So you're talking about trusting others who might be closer to issues to select nonprofits. You're talking about trusting nonprofits, not putting them through needless bureaucracy. You're also talking about giving directly, which is really about trusting people like the single moms you described to actually make choices about what is best for their life, which, honestly, they'd be in the best position to know.

It seems to me that trust, right, it's like the flip side of a certain humility. And I've heard you, or read of you in a profile we came across, talking about humility as important. Where does that value come from? Why is it that you bring that to the giving that you do?

Julie: There is a few different things it would come from, in my opinion. One is we kind of have a pretty, I would say, like, a greater story as a family. We've had to deal with a lot of challenges— growing up with a mom with disabilities. Also seeing, I think, how money has really helped provide for her and meet needs that we would have had a very different trajectory without my dad's career in venture capital and being successful with that and being able to provide for all of us and everything that she needed.

I think it also does come from a strong family culture that is rooted in the Christian faith of really looking out for others and really being called to care for the poor. Giving is a humbling experience too. I mean, if you're really keeping your eyes open and your ears open, it's incredibly humbling.

It's also very inspiring I think often you can feel small as a donor, maybe some people would think that you'd feel really big and kind of outsized because you're giving a lot of money, but when you really hear what's happening and hear from the people who are benefiting from it and whose lives are changed, it is a humbling experience. And I think also just as siblings, it's hard for me to represent everybody because we've all had different stories, but we've all had to wrestle with our privilege and make sense of what it means to grow up in a family that has wealth and also kind of being invited into this. It's an opt-in volunteering role for everybody except for me. So it's a choice and I think humility is integrated into that for all of us in different ways.

Grace: Julie, in that vein what's one organization that you feel especially glad to be supporting and why?

Phil: We'll tell the other 79 grantees not to listen to this episode.

Julie: One that I am in wearing both hats as the executive director and as Julie, the sibling, one that I really am passionate about is Village Schools International and the reason why I am passionate about it is their model, and maybe that's related to what I've been talking about around trust. But it was started by kind of a missionary couple, which I think became really integrated into the local community and had started in the Congo, got the communities to start schools, but all of the students, parents and families had to get the materials for the schools and actually build the school themselves. And this organization would provide a roof. So it's not about like an organization coming and saying you need this school, it's all led by the community themselves. I think the reason why I love it is it just hits on some things I really care about which is community-driven organizations that are actually listening to what the needs are. And that's where kind of the power and the respect is given.

Grace: I'm wondering, as a steward of second-generation wealth, what advice do you have for first-generation wealth creators who are trying to encourage that next generation to have a culture of giving?

Julie: Well, I spoke to a few things earlier that I would reiterate: start early with your second generation, if you can, and start small. Let them have a voice in what would make it fun and what would make it enjoyable for them. Create space for everyone to show up as their unique selves. Now, for example, we have within our group of five, we have someone with social work, you know, a master's in social work, a passion for immigrants and refugees, expertise in business, expert in health. I'm kind of like the nonprofit person. And so we all kind of bring our own perspectives and I think that's important to value when

thinking about giving together and then I would also say, like, be flexible. And don't take yourself too seriously as a family, just try things, experiment. I think that has been part of the joy for me in this is being able to try new things and know that there's freedom to make mistakes. It's part of the whole journey. And then, I think, there's family interests and values, which are important, but I would still say in your orientation as a family, don't make it about you. There is so much value in making it about all the people that are benefiting from the work. So as much as you can, don't take yourself too seriously and don't make it about you.

Grace: Well, Julie, to finish, we ask all of our guests giving done right to you means: fill in the blank. How would you answer that?

Julie: Having an open hand, trust those that you're giving to do the work that they say they're going to do and have fun doing it.

Grace: I love that. Thanks for joining us, Julie.

Julie: You're welcome. Thanks for having me.

Phil: Grace. What'd you think of our conversation with Julie?

Grace: I loved it. I think some of the stories that she talked about, like her grandfather giving all the cousins some money or the sibling trips, I think that they're just, they just stick in my mind, right? These are things that I think any family could try. You don't have to necessarily be a major donor, and I just feel inspired by it. I think that something maybe that I'd want to try with my kids.

Phil: I kind of tried to make this point when we were talking with her, but like, money so often tears families apart, but money has held them together in some ways. And I thought that was powerful.

Also loved, as I'm sure you did, just the trust that she places in those that they fund.

Grace: Yeah, definitely. I mean, I think that it could have been very easy for her to step back and say, "oh, I'm going to wait until this shakes out." But they acted really quickly, and they didn't let the perfect be the enemy of the good. They asked other people for advice. They knew who to trust in terms of experts, and so they didn't have to be the expert on everything. And so they moved the money quickly, which ultimately is what matters.

Phil: Yeah. Yeah, exactly. And there's certain respect that she brings for those who are in the position that she was in when she was raising money, right? Like she respects the job that is done by people working day-to-day in nonprofit organizations and that comes through in how they approach.

Grace: Yeah. I'm also just struck how she mentioned there is a greater story of their family, right? And they have done the work to understand that story. They have wrestled individually and together about their family history and also their relationship with money. And that is a really powerful journey that now informs so much of their work.

Phil: Yeah, absolutely. I love what you said at the opening about how we're constantly asked, "hey, who can you introduce me to so that I don't make a bunch of predictable mistakes?" And I really am asked that all the time by donors. And I think if people listen closely, as I know they did, they can avoid mistakes, and they can follow her words of wisdom, and they'll be better givers as a result.

Grace: So, Phil, where can people go for more information about effective giving?

Phil: In addition to our website, cep.org, and also givingdoneright.org, which has all our podcasts episodes and show notes, folks should also check out National Center for Family Philanthropy, ncfp.org, which has a lot of great resources related to some of the issues that we touched on in today's episode.

Grace: You can find us on Twitter @gracenicolette and at @philxbuchanan. You can also send us a note with any suggestions or comments at gdrpodcast@cep.org.

Phil: Big thank you to our sponsors: Walton Family Foundation and also National Philanthropic Trust. If you like the show, please leave us a review on apple podcasts; it does really help.

Grace: Thanks again to Julie for joining.

Giving Done Right is a production of the Center for Effective Philanthropy. It's hosted by me, Grace Nicolette, and Phil Buchanan. It's produced by Sarah Martin with mixing and engineering by Kevin O'Connell and additional editing by Isabel Hibbard. Our theme song is from Blue Dot Sessions and original podcast artwork is by Jay Kustka. Special thanks to our colleagues Molly Heidemann and Sae Darling for their research and logistical support.