

Building a family foundation – safeguarding vision and values

As ACF members know well, establishing the right structure and strategy is fundamental to any foundation. But setting up a family foundation brings with it other complexities. Eight months after the launch of the Jack and Ada Beattie Foundation, Director Alexandra Taliadoros outlines some of the issues this involved.

A small family initiative, the Jack and Ada Beattie Foundation was launched in November 2011 and supports marginalised and vulnerable people facing social injustice and inequality in London and the Midlands. Founded by advertising guru Trevor Beattie, the Foundation was never to be an exercise of ego, but a shared organisation ‘owned’ by all eight Beattie siblings in honour of the values bestowed upon them by their beloved parents – Jack and Ada.

My task, joining forces with the family last year, was to develop the organisation to formalise the giving motivations of the siblings, each as strong principled and averse to ‘authority’, ‘rules’ or ‘charity speak’ as the other. We were ultimately shaping the family’s legacy.

Strategic framework

Family foundations by their very nature rest upon personal values, constructed in an intimate manner and driven by emotional investment. However, it was decided that for our reach and impact to be as efficient and effective as possible, we would need a strategic framework to inform, further and sustain our giving. We aimed to hold a clear vision, which would be realised by responding to apparent funding

needs, evaluated on criteria important to the family.

Yet with family foundations the challenge is how to apply strategy and structure without damaging the personal fabric binding the organisation together. As they move from the traditional philanthropic ‘kitchen table approach’ where

“The Foundation will fight against injustice and inequality in all its forms (when you come from a family of TEN, you soon learn the importance of equality...)”

Trevor Beattie

giving decisions are made by the family internally and informally towards pet projects, will family ownership and values be lost in a sea of rules and regulations?

Strengthening values

Decidedly not. We found that strategy and structure actually strengthens and safeguards the family’s values. Through our vision, we wished to accommodate

everyone’s giving interests and philanthropic concerns – tricky when the family foundation represents eight siblings.

Two sentiments that underpin all the siblings’ philanthropic values were Equality and Justice. Yet it was essential we narrowed our focus and attention within these enormous umbrella notions to target funding as well as shape our objectives. How were we to achieve measured results under such huge themes?

A solution was found in adopting three themes:

- **Dignity** – whether it be great age or great need, or just the fundamental requirements: we’ll demand dignity for those denied it;
- **Freedom** – from freedom of expression to the flight of ambition: we’ll support those who feel held down;
- **Sanctuary** – everyone needs a place. And whether it be emotional reassurance or the safety of physical surroundings, we’ll help build it for those who seek it.

These themes can be subjectively interpreted by the family yet provide a direction to structure giving. They are further filtered by the geographical preferences of the family towards London and the Midlands.

The Foundation selects partners under each of the themes, providing in-kind support as well as financial assistance. As the family says: *"We'd like our support to be as emotional as it is financial, hence our mission statement: Knowing that someone is fighting your corner is half the battle won."*

Funding is available for partners who can demonstrate an injustice or inequality within those themes. Support is awarded to credible projects with measured objectives and deliverable outcomes.

Combining a pro-active and re-active approach enables us to actively identify partners that fit within the Foundation's giving strategy and to widen our knowledge of sector needs through the applications we receive.

Obviously, effective monitoring and evaluation of giving is beneficial for both funder and grantee. It allows the family to safeguard their values as well as illustrate achievements in an accountable and transparent way. We intend to share our findings so that lessons can be learned across the giving community.

Structure

When considering legal framework and governance, of principal concern was that the Foundation exist as a viable, sustainable organisation whilst retaining the personal and flexible sentiment of the family that makes it so special. The structure of a Charitable Trust appealed – as opposed to a company limited by guarantee or a Charitable Incorporated Organisation – as it allowed us simplicity and closeness without the burden of bureaucracy, yet retaining the protection of the charitable legal system.



Trevor Beattie

It was important for the family that trusteeship remained amongst the siblings to ensure their passion and values were truly enacted. We are also establishing an advisory board that draws on external expertise and experience across the public and private sectors.

In addition to remaining open to information from grantees as to the requirements of funding, we feel it enormously important to engage with other foundations to ensure capacity building and learning development. Networks are a vital part of this, and we

are a member of the European Association for Philanthropy and Giving (EAPG), the Ariadne Network, and of course ACF, who provided crucial help in bringing the Foundation to life.

Big ambitions

Size is often thought a limiting obstacle to strategy and structure for foundations. Like many, our staffing tally rests at one and we are not ashamed of our BIG ambitions and BIG dreams for the Foundation; we're just realistic as to how these might be achieved.

We want to have a voice on aspects of social justice and equality (our umbrella notions) and appreciate there are already significant and weighty players in advocacy and research in these fields. However, we believe that through partnership small organisations can explore, challenge and raise important points for all.

We have a three-pronged approach to advocacy and research – using a strong communication framework, inclusive of social media (such as Twitter and Facebook) to engage with donors and grantees alike; collaborating with other funders in publications; and hosting seminars to promote discussion and debate on topics relevant to us.

Conclusion

For us, subjective strategy and structure safeguard and strengthen the Beattie family's vision and values. The virtue of philanthropy is that it's driven by the heart, and when coupled with the mind can change the lives of so many. Ultimately, this is what we all hope to achieve. ■

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