



## What's Next for Philanthropy in the 2020s

Flipping Orthodoxies: **Family philanthropy expansion deck**

# About this Document

This document is intended to accompany the [Flipping Orthodoxies overview](#), which was created as part of the field-wide “What’s Next for Philanthropy in the 2020s” initiative supported by **Deloitte Tax LLP**, the **Robert Wood Johnson Foundation**, the **John D. and Catherine T. MacArthur Foundation**, the **W.K. Kellogg Foundation**, and the **McConnell Foundation**. The initiative engaged more than 200 philanthropy executives, professionals, donors, board members, experts, and grantees in a dialogue about the current state of philanthropic practice and where it might be headed in the coming years. To learn more about What’s Next for Philanthropy in the 2020s, visit [www.futureofphilanthropy.org](http://www.futureofphilanthropy.org).

For more information on the Flipping Orthodoxy exercise, please review the instructions in the [overview](#) document.

To produce your own customized Orthodoxy Card Deck, print the following pages, double-sided, “Actual size” on heavy card stock. Combine those pages with the [General Philanthropy Card Deck](#) and any additional Expansion Packs that are relevant to your philanthropy (e.g., Community Philanthropy, Family Philanthropy, etc.), which can be downloaded separately from the [website](#).

Once you’ve printed the relevant additional pages onto card stock, cut the combined set of cards to size (eight cards to a page) to create your full deck. Most copy centers or print shops can print and cut the cards for you. Make sure to print one deck for each small group participating in the exercise.

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Philanthropy**  
in the 2020s

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**Flipping Orthodoxies**  
Family Philanthropy Expansion

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by **Deloitte.**

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Monitor Institute  
by **Deloitte.**

Trustees should  
be family  
members

Procedures and  
processes will  
dampen our  
ability to be  
nimble

Family values  
should always  
guide our work

Family issues are  
separate from  
foundation issues

Family  
philanthropy  
keeps families  
together

We can't change  
the founder's  
priorities

The key benefit  
of philanthropy is  
the tax deduction

#### INSTRUCTIONS

**Deal out the full deck of cards around your table.** It doesn't matter if people have a slightly different number of cards in their hands.

**Look at your hand of cards.** For each card, think about the orthodoxy described and consider: Does it still make sense? What would it look like if you flipped it — partially or completely? What impact would flipping this orthodoxy have on your organization or community?

**Choose the card with the orthodoxy that is most interesting to you.** Why is it interesting? What would it look like if you flipped it — partially or completely?

**"Play" the card at the center of the table.** In 30 seconds or less, explain the orthodoxy to your colleagues, telling them why you chose it and what it might look like if it were flipped. Go around the whole table, with each person playing his or her orthodoxy.

**Discuss the cards on the table.** Choose or vote on one orthodoxy that the table finds most appealing. Write one sentence directly on the card about why it was so interesting to the group.

Share back with the full group in 30 seconds or less.

This exercise is part of the *What's Next for Philanthropy in the 2020s* initiative. For more information, visit [www.futureofphilanthropy.org](http://www.futureofphilanthropy.org).

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Monitor Institute  
by **Deloitte.**

Philanthropy is  
something you do  
toward the end of  
your career/life

Charitable  
activities create  
family unity

Families should  
give only to  
proven nonprofits

The family knows  
what they want to  
support

Donors can trust  
their family to  
continue their  
charitable legacy

A foundation/DAF  
is the best vehicle  
for my work

We need to  
hire staff to  
do effective  
philanthropy

It's not our  
responsibility to  
engage younger  
family members

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Monitor Institute  
by **Deloitte.**

The next  
generation will  
understand our  
philanthropic  
goals

Our staff should  
all be “in-house”

We pay for  
programs,  
not general  
operations

We make grants

We are  
permanent

We invest  
our assets  
to maximize  
financial returns

Our annual  
payout should be  
5 percent

Foundations  
“fund” – they  
don’t “do”



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Monitor Institute  
by **Deloitte.**

Add your own orthodoxy

We operate  
independently  
from other  
funders

Foundations must  
choose between  
spending down  
or existing in  
perpetuity

Foundation  
Boards approve  
grants

Add your own orthodoxy

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Add your own orthodoxy