



Duim Family Foundation

Learning to recognize and leverage family talents

- Opportunity** The Duim Family Foundation focuses its giving on improving the lives of women and children locally and internationally, but until recently, only the first generation (G1) handled grantmaking. G2 and G3 felt generally uninspired, uninformed, and overwhelmed by a process that lacked clear vision and a succession plan. The group needed to decide whether the foundation should sustain, how to start to transition leadership to G2, and how to engage everyone in a fun and inspiring process.
- Process** To build consensus, focus and unity, Sarah Hopper designed a customized, inter-active family retreat to appeal to all ages, ranging 6-68. The first activity engaged the youngest members of G3 (ages 6-12) while the Board members focused on finding common ground around values. Following an enlightening presentation to their parents and grandparents, the children were excused, and Sarah guided the adults through discussions about the future of the foundation. She helped them develop a ten-year vision for the Foundation, presented the family with a framework to define roles and responsibilities, and identified clear strategies for the next 12 months to empower G2 members to assume leadership roles and to ensure that Foundation activities are fun and engaging.
- Result** Morning exercises with the children infused the day with high energy and enthusiasm, and taught G1 leadership the importance of early engagement as a way for children to learn family values and see their place in a succession plan. Sarah helped the group establish new Board positions, a plan for moving forward, and training tools. With this essential framework in place, the group was able to:
- Commit to the future of the family foundation
 - Inspire new leadership and ideas
 - Identify next steps to achieve goals
 - Create a timeline and agendas for future meetings to ensure steady progress
- Value** As an outside advisor, Sarah sees patterns, opportunities and talents that can often go unnoticed by the family. Her retreat exposed unproductive practices and helped the Duims understand how to recognize their individual talents and leverage them while working toward a common goal. Younger members felt empowered to take on new leadership roles and learned to trust that they would have a voice in the process thanks to good communications and the clear framework they established as a group. Sarah helped the family move beyond anxiety about succession, respect each generation's right to ownership in the process, and reignite a multi-generational passion for the power of giving.

"Sarah was the perfect fit (personality, professionalism, thoroughness) for our family. She did a great job of preparing for the family retreat and gracefully guiding the conversations throughout the day. I'm guessing we are now years ahead of where we would have been, had we gone it alone."

~ Duane Duim, 2nd generation Board Member, Duim Family Foundation