



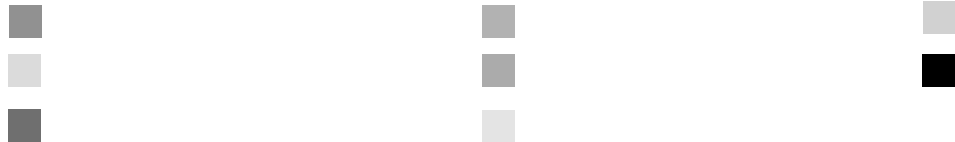
1. Introduction

1.1 Methodology

1.2 Overview of articles

Giving back to society was the top reason
for giving

Figure 2.5:



Note: Number of respondents, 190. Figures need not sum to 100% because respondents can select multiple options.

3. Strategic Time Horizons in Philanthropy

- 3.1 Awareness and adoption of strategic time horizons
- 3.2 Reasons for adopting different strategic time horizons
- 3.3 Philanthropic strategy and time horizons
- 3.4 Perceived benefits of strategic time horizons
- 3.5 Interrelational challenges

The leading reasons for choosing time-limited approaches

Figure 3.3:

Note: Figures may not sum to 100% due to rounding.

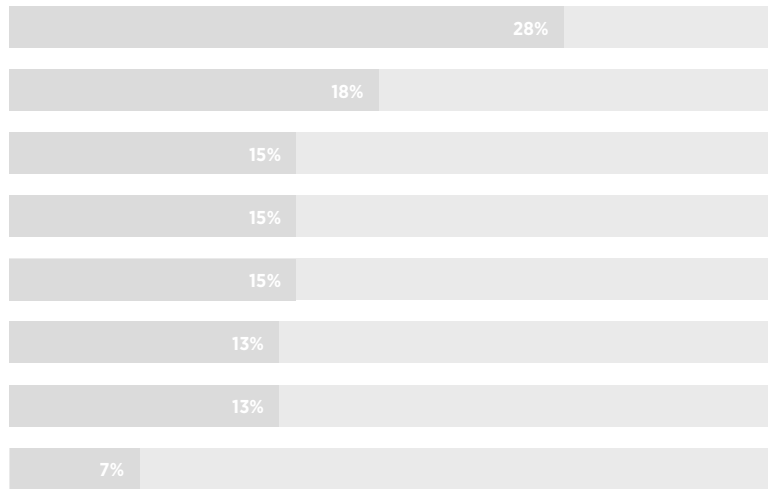
Philanthropists often reviewed their strategies yearly

In-perpetuity giving

The in-perpetuity approach

The time-limited approach

Figure 3.15:



Note: Figures need not sum to 100% because respondents could select multiple options.

4.

The Role of the Next Generation

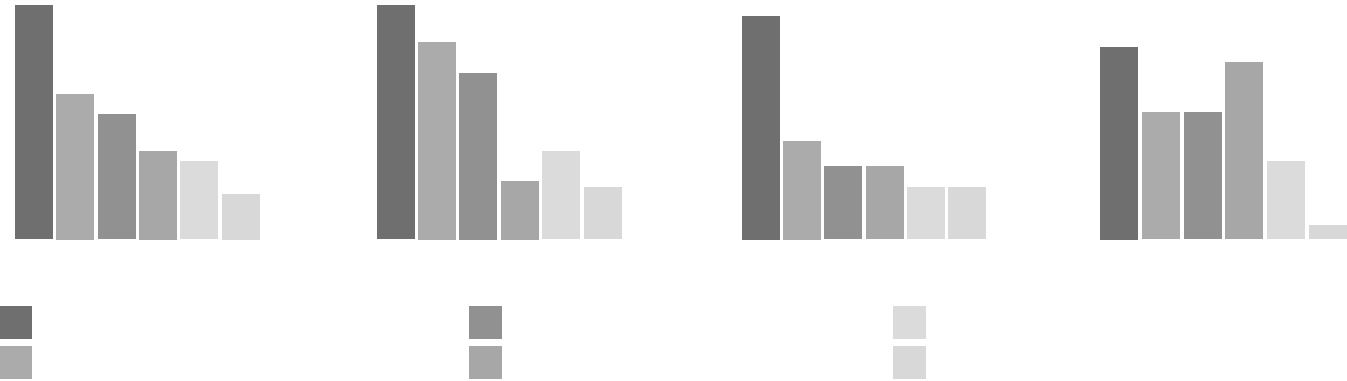
4.1 Family involvement in philanthropy

4.2 Estate and the next generation

4.3 Adopting strategic case scenarios used by the next generation

Roles played by the next generation

Figure 4.3:



Note: Figures need not sum to 100% because respondents could select multiple options.

	Global	United States	Europe	Asia-Pacific	Giving in perpetuity	Time-limited giving
Instilling philanthropic values and a sense of moral responsibility	65%	68%	55%	70%	67%	61%
Actively engaging them in the organization's philanthropic work	55%	56%	38%	59%	60%	46%
Creating meaningful roles for them	38%	48%	33%	37%	42%	35%

Note: Figures need not sum to 100% because respondents could select multiple options.

Decision-Making Structures

6. Conclusion

6.

Foundation history and guiding principles

From its inception in 1988, the California-based Jacobs Family Foundation was designed to advance the field of philanthropy based on the founder's personal experience, philosophy, and desire to see it impact our lives.

The founder, the late Dr. Joseph Jacobs, also known as Joe, grew up in poverty, often eating a fry bread as his meal. However, as recounted by his daughter Valerie Jacobs, the current chair of the foundation, "He worked his way through school with two dollars a week." He earned a Ph.D. in Economics, a distinguished economics professor at the University of California. In the late 1970s, the Jacobs family became involved in the community. Thereupon, they started to reflect on issues of our society.

After discussing it with his wife, Violet, Joe stated his family said, "You guys are a way w5.8uv9.9(e)-16(,t)-114.8()TJdT-0039Tc-1051r-8.8(e)-1.5(D)-t5.5(l)1.9(o)1(c)-127(e)-dle9o 'ee o eede Osod et oi la ae

Giving back to the community

One of the main objectives of the Jacobs Family Foundation was to develop 65 acres of land to support the socio-economic development of the Diamond District neighborhoods. The family wanted to involve the community in the decision about how to develop the land, so they recruited a team of community leaders to solicit input from 600 residents. The bulk of the residents wanted to build a commercial and cultural center, which was realized later as Market Creek Plaza.

The plaza opened its doors in 2004, and the foundation launched a first-of-its-kind community initiative (IP) of services in the plaza in 2007. Nearly

VALERIE JACOBS, VICE CHAIR,
THE JACOBS FAMILY FOUNDATION

Below: Market Creek
Plaza

The Dream Village program

To address these issues, the Screwvalas introduced the Dream Village program, which was founded as a holistic 360-degree rural development model in 2013. Today, it has benefited over a million people, and the program operates in 2,500 villages across the rural districts of the state of Maharashtra. The program currently serves approximately 1,000 communities with a staff of 300.

Using a 360-degree strategy, the program is implemented in a road-based model through three pillars: (1) providing rural communities with electricity and other basic services; (2) providing holistic road-based community development that covers health, education, economic development, and water/sanitation; and (3) installing the latest agricultural technologies and self-sufficient food production systems.

To date, the program has benefited 135,000 children through its school program, over 1,300 rural schools, awarded 4,000 scholarships to students, and trained a large number of teachers/trainees. As a result of its work, the foundation has provided over 10,000 people with clean drinking water and toilet facilities. More than 10,000 people have been trained, and nearly 15,000 cataracts surgeries have been performed.

The foundation uses what Ms. Screwvala refers to as a “4E” strategy, which stands for engage, empower, execute, exit. She explains, “We involve a community from the start by building a relationship with its members, so as to really understand them before we execute programs which will impact them. As these programs unfold, we build the community members’ skill sets and empower them to take the program forward on their own. Finally, when we exit, we empower the community members so that they were empowered to take the economic initiatives forward on their own.”

"We involve a community from the start by building up a relationship with its members, so as to really understand them before we execute programs which will impact them."

ZARINA SCREWVALA, CO-FOUNDER
THE SWADES FOUNDATION

Above: Economic Development — Farmers harvesting vegetables (second crop) through drip irrigation supported by the foundation

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Foundation history and guiding principles

James H. Miller was the CEO of Honeywell Corporation, a private investor, philanthropist, and community activist. In 2004, when he was 88 years old, Mr. Miller established the Roberta Foundation as a charitable organization and endowed it with approximately \$150 million to be used in the course of

It was not always easy, however, to motivate trustees to cooperate with innovative

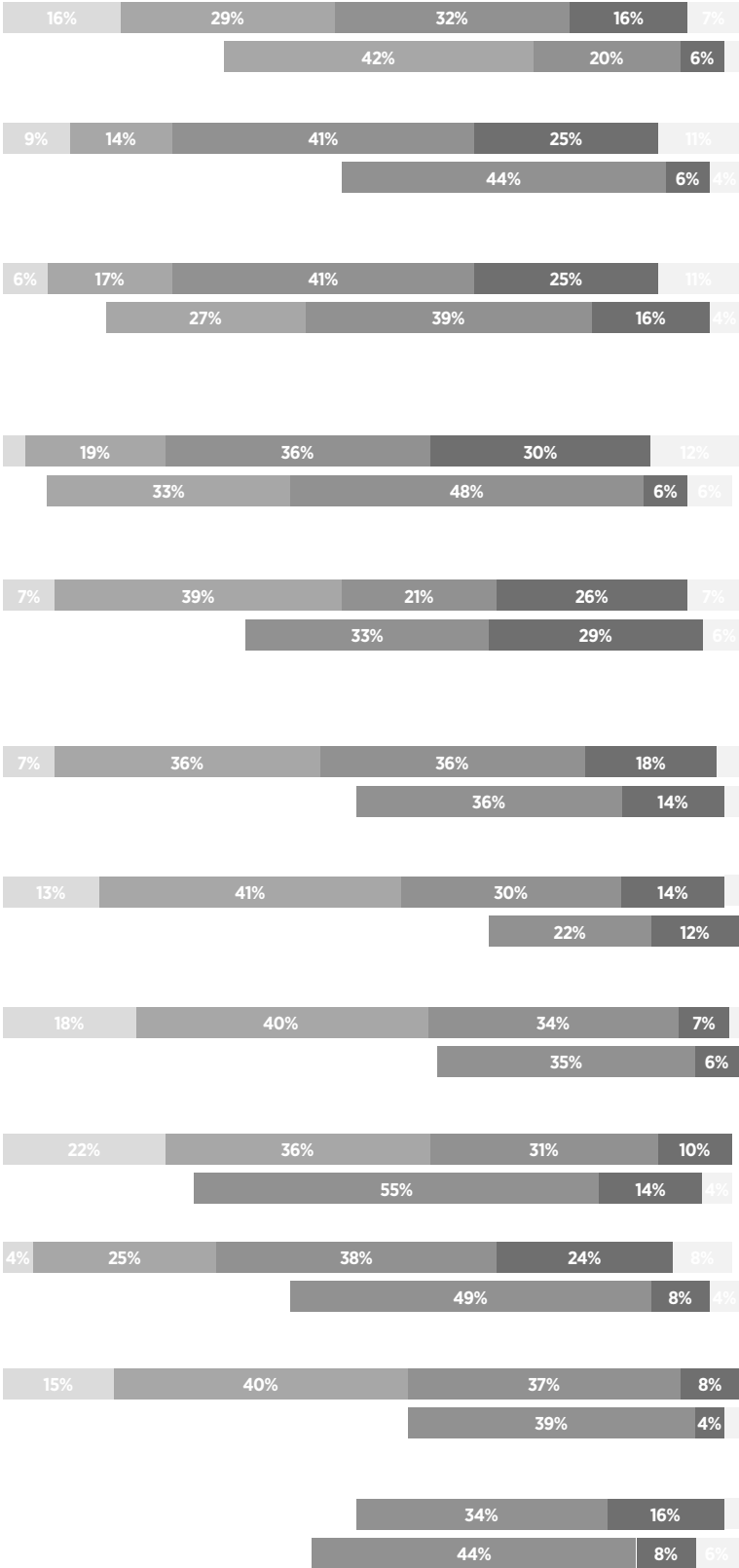
7.4 Youth and Philanthropy Initiative

- **Year of founding:** 2016 (split off from a traditionally limited private family foundation, the Tosca Casale Foundation, founded in 2001)
- **Location:**

successful projects. The best strategies are owned by community leaders, NGOs, and schools, which are best informed about their own unique needs, to work together for a common purpose.

Over its 17 years of existence, YPI has partnered with hundreds of schools and developed a strong curriculum and culture. McLella says, "Hundreds of thousands of young people have developed a built-in relationship that is aware of the underlying social issues of their communities. They are completely unbiased and excited to

Below: Each year, YPI Canada grants hundreds of thousands of dollars to community-based social service charities, 100% decided by thousands of high school students in its school-based youth philanthropy project



About Campden Wealth

