THE BETS:
AN EXPERIMENTAL APPROACH TO EDUCATING TRUSTEES AND EXTENDED FAMILY MEMBERS ABOUT PROGRAM AREAS

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THE BETS: AN EDUCATIONAL EXPERIMENT

by Deanne Stone

In January 2001, the Andrus Family Fund launched the Board Exploration Triads (BETs) project, an experimental approach to learning about grantmaking. Participants were divided into small study groups or triads composed of an Andrus Family Fund trustee, an extended Andrus family member, and an outside expert. Over a period of eight months, each BET explored a different aspect of the Fund's two program areas: Transition from Foster Care to Independence and Community Reconciliation. In September, the teams met in New York to share what they had learned. This paper describes the BET process and suggests how other family foundations may adapt the model to their circumstances. It is not intended as a summary of the findings of the BETs' research.

Background

The Andrus Family Fund is a next-generation fund of the Surdna Foundation in New York. Although legally a part of the Surdna Foundation, it defines and manages its own programs. The Fund has a brief but unusual history, and the goals of the BET experiment are best understood within that context.

The Surdna Foundation was founded in 1917 by John Andrus. (Surdna is Andrus spelled backwards.) It is one of the oldest and largest family foundations in the U.S. Surdna not only has substantial assets; it has a substantial clan behind it. John Andrus had eight children. Today the family, including spouses, numbers close to 350. Although the periodic reunion of the eight branches makes for joyful family gatherings, the size of the family imposes a limit on the number of family members who can participate in the family's philanthropic activities.

Besides the Surdna Foundation, the Andrus family has founded four other charitable institutions. Early on, the family established a tradition of board service that was followed for more than 70 years: trustees appointed to the Surdna board also sat on the boards of the family's other charitable institutions. That system worked well enough when the philanthropies were smaller and less complex. But as the programs expanded, so did the demands on the trustees. Several years ago, the fourth-generation Surdna board decided it was time to create a new system of board service that would open up the family's philanthropies to the extended Andrus family. The family had a large pool of talented family members, and many were eager to contribute to the family's charitable institutions. But not even five boards could provide enough seats to accommodate the 200 Andrus family members 25 years and older.

In 1998, the Surdna board established the Family Involvement Committee, a team of four board members charged with creating a plan that would accomplish its goal of increasing family participation in and knowledge of the family's philanthropies. The result was the Andrus Family Philanthropy Program, a groundbreaking approach to developing and promoting opportunities for education and training in philanthropy and public service. Launched in January 2000, the Program consists of two parts: the Andrus Family Fund to provide hands-on grantmaking experience for family

members between the ages of 25 and 45, and an education, involvement and communications network to inform the entire Andrus clan about opportunities to participate in philanthropy and in public service.

The Surdna Foundation hired a new staff to run the Andrus Family Philanthropy Program: Steve Kelban was appointed executive director and Masiel Rodriguez-Vars as program associate. Charged with developing both pieces of the Program simultaneously, they got the Andrus Family Fund up and running while laying the groundwork for the education, involvement and communications network. Currently, the network consists of an Andrus Family Fund Web site, a database of family statistics, and a family newsletter. The newsletter, written by family members and staff, includes reports on the work of the family's philanthropies, postings of opportunities for participation in the Andrus Family Philanthropy Program and non-profit organizations throughout the country. In addition it reports on the public service activities of family members.

The Foundation's Innovative Mandate: Do It Your Way!

Typically, when family foundations train younger family members as grantmakers—either by setting up a junior board or a small fund—the senior board expects the next generation to follow the system established by the foundation. The Surdna board took a different tack. It encouraged the Fund to challenge the thinking and practices of the older generation. Welcoming the mandate to be inventive, the new board—four men and four women representing different branches of the family—set out to design a grantmaking approach that reflected their interest in promoting social change.

Through the staff, the trustees learned of the work of William Bridges, an organizational management consultant. In his book, *Managing Transitions: Making the Most of Change,* Bridges distinguishes between *change* (external and situational) and *transitions* (internal). Bridges sees transitions as a psychological/emotional process made up of three phases: an ending (letting go of the familiar), a neutral zone (the old situation no longer exists and the new one is not yet formed), and a new beginning (after the first two phases have been successfully navigated). To achieve lasting change, Bridges asserts, individuals must move through all three phases. Intrigued by Bridges' work, the board invited him to work with them in thinking through their approach to grantmaking.

Bridges' work seemed to the trustees to have direct application to the Fund's program areas, its grantmaking goals and, in fact, to the board itself. Trustees have set term limits, and as they prepare to transition off the board, their cousins will be preparing to transition onto the board. In an unusual step, the board voted to make Bridges' theories central to its grantmaking. That is, the Fund would support researchers and organizations whose work contributed to the creation and maintenance of successful transitions in its two program areas. Additionally, the board and staff hoped to be learning partners with their grantees.

Planning the BETs

Sidebar: **Dual Goals of the BETs**

Andrus Family Fund

- Educate trustees and family members about grantmaking
- Examine program areas from different perspectives and in-depth

- Assess the applicability of the transitions framework to targeted settings
- Provide staff with tools to sharpen grantmaking tactics and strategies

The Andrus Family
- Involve extended family members in the family's philanthropy
- Build a pool of educated family members to draw into service in the family's philanthropies
- Foster interest in community service
- Build closer ties among Andrus cousins

Forming the BETs Teams
The staff conceived of the BETs as a way to deepen the trustees' understanding of the Fund's program areas and to produce a well-informed grantmaking strategy. They also saw an opportunity to include a select group of family members in a meaningful learning experience. As mentioned earlier, the goals of the Andrus Family Philanthropy Program were to involve extended family members in the family's philanthropies and to spark their interest in public service. The BETs project was ideally suited to further both aims.

The Family Involvement Committee of the Surdna Foundation--the liaison between Surdna and the Andrus Family Fund--sent a letter to family members 20 years old and older, including spouses and partners announcing the opportunity to participate in the BETs experiment. To attract a cross-section of family members, the Committee listed only two requirements: sufficient time to participate and a willingness to learn. The eight family members selected to participate in the BETs ranged in age from early twenties to mid-fifties, came from diverse professional backgrounds, and represented different family branches.

While the Family Involvement Committee was selecting family members for the BETs, the staff drew up a list of potential "experts" to work with each triad. In the early days of the Andrus Family Fund, Steve and Masiel had interviewed approximately 50 academics and professionals from around the country about program areas of interest to the trustees. To that list of contacts, they added the names of other key people with whom they had worked closely in the past.

Before beginning their search, Steve and Masiel developed criteria for selecting the experts. Besides having expertise the Fund needed to enrich its knowledge of the program areas, the experts had to have the right personalities for working with the teams. "We could have learned something from any expert," says Steve, "but we were interested in creating a learning experience for all the participants. We looked for experts who liked to teach, who would be encouraging as well as instructive, and who would put the team members at ease."

Within one month, Steve and Masiel had chosen eight experts who fit their criteria and whose schedules would allow them to work with the BETs over the next eight months. They included academics, consultants, practitioners, a policeman/lawyer, and a law student who had grown up in foster care. Half the experts lived on the East Coast where most of the family members lived. The others came from Minnesota, California, Texas, and Utah.

Each expert received a stipend of $5,000. In return, they were expected to read Bridges' book, *Managing Transitions,* attend two meetings in New York, stay in contact with the Andrus Family Fund staff, and work with their teams in selecting a research topic within the expert's area of expertise. Finally, they would work with their team to develop a paper documenting what they had learned. The paper—a draft and final report—would be written largely by the expert but with input from team members.

Steve and Masiel divided the participants into eight BETs, taking into account factors such as personality, preferences, experience, and geographic proximity. Because the participants were so geographically dispersed, they succeeded in forming one team only in which members lived in the same state.

The Opening Meeting

The kick-off meeting for the BETs took place in January 2001 at the Surdna offices in New York. The agenda for the weekend alternated between training sessions for the whole group and breakout sessions to allow the BETs teams to meet individually. Bringing all the BET participants together was critical for developing a feeling of camaraderie--a sense that they were all part of an exciting experiment. Some of the family members had never met their cousins before and, given the geographic dispersion of the participants, this meeting and the closing meeting in September would be the only opportunities for the team members to meet face-to-face.

The participants had been asked to read William Bridges' book, *Managing Transitions*, before coming to the meeting. Understanding Bridges' theory was key to the work of the BETs as one of their tasks was to assess the applicability of the transitions framework to targeted settings. The trustees had been discussing Bridges' concepts for months and had had a one-day training session with him in New York. To allow the experts and family members to become as familiar with the concepts as the trustees, the staff showed one of Bridges' training videos to all the participants. The staff followed with a briefing session on the Fund's program areas and a discussion of how the application of Bridges' transitions theory might further the Fund's aims of promoting social change.

Grounded in Bridges' theory and the work of the Fund, the participants were ready to turn their attention to the main goal of the meeting: getting each BET started in planning its work. The task of the BETs was to research topics that would add to the Fund's knowledge of its program areas and bring focus to the Fund's grantmaking.

The Fund has two major program areas: Transitions from Foster Care to Independence and Community Reconciliation. Four of the BETs would concentrate on foster care and the other four on community reconciliation. Beyond those broad categories, it was left to the individual BETs to choose what aspect of the program area they wanted to study and how the topic they chose would make maximum use of the experts' expertise.

Before coming to the meeting, the staff had mailed information sheets to the participants giving an overview of the project and the tasks the BETs were expected to complete at each stage. (See appendices A and B) To help the BETs design their projects and pace themselves over the eight months, the staff reviewed the stages of the project again.

1. Early stage: get to know one another and what each brings to the triad; confirm collective understanding of the transitions framework; define the scope of their research.
2. Middle stage: clarify scope of work and the questions the triad proposes to answer; discuss how each member will function as a resource; decide on a plan of action (e.g. Whom will you consult? How will you stay in touch? How will you consolidate what you know?); build a base of knowledge.
3. Later stage: submit draft by expert in July; submit final report in August; reconvene with all BETs in September.

Over the weekend, the individual BETs met twice to get to know one another and to begin brainstorming possible topics of study. Steve and Masiel reminded the participants that were in the early stage of the project. The staff did not expect them to have a clear sense of how to proceed until they reached the middle stage.

Sidebar: To assess what each member can contribute to the triad, the staff suggested that team members ask themselves:

- What do the board member and family member have to know about the expert's field to help link his or her expertise to the program area?
- What do the expert and family member have to know from the board member about the transitions framework and the program area to shape the advice he or she gives?
- What do the expert and board member have to know from the family member to help the triad present their briefing paper in ways that are accessible to the wider world?

Getting Started

One of the unknowns in running a new project is determining how much direction to give to the participants. Too much structure can stifle the teams' creativity, and too little structure can cause them to flounder. The staff settled on an approach that Masiel described as "flexibility within well-thought out parameters."

Before the January meeting, the staff had talked with each of the experts separately about the goals of the project. Additionally, they had mailed descriptions of the project, including tasks and timelines, to all the participants to get them started in thinking about the project. At the January meeting, they set aside time to answer participants' questions and to reassure them that the staff would be available to them should they need them.

With the groundwork of the project laid down by the staff, the BETs were now free to decide their topics, their methods of investigation, and the pace at which they would work. The only deadlines were the draft of the paper due in mid-July and the final report due in August. And the only restriction was one of budget: because the cost of bringing together team members was prohibitive, the teams would have to communicate through conference calls and e-mail.

Sidebar: **BET TOPICS**

Foster Care to Independence

BET A: Mentoring (later changed to Evaluation)
BET B: Gay, lesbian, bisexual, transgender and questioning youth
BET C: Models of independent living programs
BET D: Models for foster youth participation in programs

Community Reconciliation
BET E: Issues related to conservation, Native Americans, international conflicts
BET F: Police/community relations
BET G: Practices and strategies
BET H: Facilitated dialogue

The BETs at Work
Because the project extended over eight months, the BETs had time to explore their topics in depth and to digest what they had learned. All the groups alternated between periods of concentrated work and periods of reflection and, as expected, each BET developed a distinctive personality. The specialty and availability of the expert were factors, as were the team members' interests and preferred styles of working.

Some experts took strong leadership roles. They approached their roles as teachers imparting their experiences in the field to the team members. These experts tended to do most of the planning for the team and provided more structure. Other experts saw the process as an opportunity to raise questions and explore issues. In the case of one team, the pieces of its investigation did not fall into place until the very end.

While all the BETs relied on background reading to inform their members, some emphasized experiential learning to complement their reading. BET F, for example, investigated police/community relations. The expert in that group, a police lieutenant and head of the department of investigation, arranged for his team members to go on police ride-alongs in their respective communities—an experience that made a deep impression on both individuals. During the course of BET F's research, a conflict between the police and several communities was unfolding in Louisville, the hometown of one of its members, Peter Benedict. Peter collected newspaper articles chronicling the chain of events, providing a case study in action for his BET.

Two BETs working on foster care visited a group home in Upstate New York, a recent grantee of the Fund. The team members met with the director and the teachers and, over dinner, had a chance to talk with some of the children. The visit proved to be a turning-point experience for Mike Spensley, a family member. Riding on the train to and from the school, he sat next to the expert for his BET. "The conversations we had that day really put the issues into perspective for me," says Mike. "In fact, the ideas we discussed on the train became the cornerstone of our BET's paper."

In other BETs, trustees took the lead in scouting organizations and resources for their team. BET B investigated issues regarding gay, lesbian, bisexual, and transexual youth in foster care—an aspect of foster care that has been neglected. Mary Lowman, a new trustee, surveyed organizations in her community to find out what special services they offered for this population. Mary, a mental health professional, had been unaware of this issue. The work of her BET opened her eyes to the scope of the problem.

Cameron Griffith, a trustee, took an independent role, too, in tracking down resources for BET E. His group looked at disputes related to conservation, Native Americans as well as conflicts between countries. Cameron located two key Native American activists who, besides giving him a list of organizations to contact, would be valuable resources for the Fund in the future.

The Closing Meeting
In September, the BETs reconvened in New York for their all-day closing meeting. Originally, the staff had planned to have each team reports its findings to the group. The papers, however, contained such a wealth of ideas and specific recommendations that there would not be time to do them justice. Instead, the staff asked the participants to focus on the key lessons they had learned.

Key Lessons and Challenges Suggested by the BETs

Organizational Challenges and Tasks
Develop clearer theory of change
Develop theories of change for each program area
Develop a mission statement for each program in addition to the existing overall mission statement of the Fund
Identify appropriate measures for success for the long term and short term
Ask what it means to be a funding organization applying a transition framework to social change

Community Reconciliation
How does the Fund define community?
How can the Fund work at an individual level and have its work impact the broader community?
To what degree should the Fund play an advocacy role or remain neutral in doing community reconciliation work? Is it effective to do both?
At what point should the Andrus Family Fund enter a particular conflict: before tensions break out or after they have broken out? And how long should it stay involved?

Transition from Foster Care to Independence
Should the Fund's interventions be targeted at the individual, program, or system level?
Are there existing models that "stick with" individuals after they have left the foster care system?

Common themes
Acknowledgement of past by all actors is key
Process is as important as outcomes
Pay attention to all involved parties, not just the obvious groups
Insider perspectives are key

The work of the BETs suggested that the Fund had to do further thinking about the practical application of Bridges' transitions theory to its program areas. The board had accepted the assumption that sustained change was more likely to occur when the emotional and psychological effects of the change process were addressed. In practice, however, they discovered that it was not so easy to recognize where Bridges' three phases began and ended. This was especially true when applied to the complex situations encountered in the field of community reconciliation.

Bridges' transitions framework fit more neatly into the transitions of foster youth preparing to move out of a foster home and into independent living. Determining what exactly the Fund's role should be in promoting attention to psychological transitions, however, would require more discussion. Should it ask organizations to

apply the framework or should the framework be used to guide the Fund's grantmaking strategy? The BETs had unearthed a fount of information and raised important questions; now the board and staff faced the daunting challenge of figuring out how to integrate and apply what they had learned to their grantmaking.

PART II
TAKING STOCK

The staff had created the BETs as an innovative approach to teaching trustees and family about the Fund's grantmaking. The experiment promised to be a stimulating educational experience—and also a gamble. Nothing like it had been tried before. Would the outcome justify the time, effort, and expense?

It was clear at the September meeting that the immediate goals of the BETs project—increasing participants' knowledge and understanding of different aspects of the program areas and informing the Fund's grantmaking—had been met. The participants described the project in such terms as "a huge success" and "intellectually stimulating and challenging."

With the possible exception of two participants, the trustees and family members came away from the experience with a wealth of information about the program areas, a more sophisticated understanding of the issues, and a greater familiarity with community resources and how to access them. The process hadn't been perfect—some teams floundered in the beginning and there were some skeptics in the ranks. But, over all, the results exceeded expectations. A closer examination of the project reveals why.

The Learning Environment

The BETs had all the ingredients for an ideal learning environment: warm and encouraging experts, mature and eager students, and small, intimate groups. The staff had conceived of the BETs as a collaborative effort to which each participant would contribute, regardless of his or her level of sophistication about the topic. In that regard, the title of "expert" is somewhat misleading. While these individuals all brought valuable expertise to the Fund, their role was one of guide rather than of final authority.

"We could have asked the experts to give us the answers we were looking for," says Steve, "but we wanted a process in which everyone would participate. While the experts were responsible for the team's delivering a product useful to the Fund, we wanted the paper to be developed as a group effort. It was the experts' skill at drawing team members in that created such a successful learning environment."

In BET C, for example, both the expert and family member worked in the field of foster care. The trustee, however, knew little about the issues. Rather than feeling left out of the discussions, the professionals regarded him as a valuable member of the team. Posing questions from a layperson's perspective, the trustee provided a reality check when the two professionals veered off into more theoretical territory.

This show of respect for differences permeated all the teams. As one expert put it, "There was no tokenism here. Everyone was treated seriously, and there was a genuine appreciation for different perspectives."

The Learning Experience
What distinguished the BETs experience from traditional approaches to educating boards was the power invested in the trustees and family members. The BETs was a real project and the information gathered by the teams was not simply to produce a report. Rather, the information would influence the direction of the Fund's grantmaking. The trustees and family members were enthusiastic participants from the start. But the knowledge that their efforts could have a potentially large impact on the Fund and the communities they served gave added weight to their assignments and the seriousness with which they approached them. As one expert said, "There's a big difference between asking trustees to read background material or to make site visits and asking them to think about how to solve a problem."

Working as partners with the experts also had a leveling effect on the teams: trustees, family members, and experts all contributed to the team's knowledge base. The independent research conducted by trustees and family members—reading, visiting agencies, consulting with professionals—helped to shape the group's thinking. Moreover, as their knowledge of the topic increased, they felt more confident in joining in the discussions.

Working in small, informal groups had another benefit. While the experts were the designated leaders, they did not "pull rank." Conversations were relaxed and, without exception, team members developed an easy rapport with one another. As a consequence, the trustees and family members left the project with the feeling that their team's expert was a colleague and one whom they would feel comfortable calling when questions arose.

Working toward a Goal
Producing a paper was an essential part of the learning design. Besides documenting information, it gave a focus to the BETs work and a goal to work toward. The staff had originally conceived of the paper as a 10-page memo. Characteristic of the individuality of the different BET teams, the reports ranged in length from 8 to 32 pages.

While the experts did the actual writing, the ideas presented in the paper represented the thinking of the whole team. The expert would send a draft of their ideas to team members for discussion in the next conference call. Team members would raise questions or add new information, and then the expert would rewrite the draft and circulate it again.

BET C took the process a step further. It sent copies of its paper to the heads of a government agency and a private nonprofit organization for review. In the opinion of the professionals were their recommendations realistic? How much time would it take to do a pilot study based on this model? And what kind of financial investment would be required? The professionals' evaluations were included in BET C's final reports.

Group Dynamics
Trustees and family members alike recognized the BETs as a rare opportunity to study areas of critical importance with experts of a high caliber. Without exception, participants felt privileged to be included in the project. That appreciation combined with the good feeling generated at the opening and closing meetings created a strong group dynamic. No matter that the cousins may go their separate ways now

that the project is completed; they will always feel a special connection to one another for having shared the BET experience.

For many family members, leaving the project before the Fund had decided how to make use of the information that they had helped to develop was difficult. Even though they understood that the BETs was a temporary assignment, the reality didn't hit them until the close of the September meeting. The mood of the group was high as they discussed their accomplishments and looked ahead to what came next. Listening to the others talk about the future, several family members expressed sadness that their formal roles had ended. They hoped to stay connected to the Fund, both as resources and as recipients of information.

That the BETs project was not just a passing experience for the extended family members was already evident. Julie Andrus had known little about restorative justice when she joined BET H last January. From the start, she felt a deep connection to the topic. Inspired by the work of her team's expert, she signed up for a training session at the University of Minnesota on peacemaking and spirituality. Now, Julie, a clinical therapist, is considering the possibility of working professionally in the field. Mike Spensley was equally inspired by the expert in his BET. He, too, knew nothing about foster care before last January. He got so swept up in the issues that he contacted the Department of Children and Family Services in his home town to learn about programs there. He has since developed a working relationship with one of the staff members and has begun attending meetings on foster youth in transition. In another development, Mike was recently appointed to the Surdna board, making him the first in the family to bridge his experiences in the Andrus Family Philanthropy Program and the Surdna Foundation.

Refining the BET Model

The most challenging aspect of the BETs design was determining how much structure to build into the project. Should the staff lay down requirements for how the teams should gather information and write their papers or should they let the teams find their own way? The staff believed that the learning would be greater if the teams chose their own topics and designed their own methods of investigation. But they were also aware that a looser structure might make some participants feel anxious.

In fact, the open-ended design did receive mixed reviews from the participants. About half described it as the greatest strength and the greatest weakness of the process. Those individuals who prefer working in a looser structure appreciated the freedom to think out of the box. But others made no bones about preferring a directed approach to learning. They were used to and liked the structure of a course syllabus, weekly assignments, and lectures. One family member spoke for several others in wishing that the experts had assumed more formal roles. "They had such vast knowledge and experience," she says. "I wanted to hear what they thought."

The staff, however, had a different learning experience in mind. They believed the experience would be richer if participants found their own way. "At the beginning, we participated only as listeners on the teams' conference calls," says Steve, "so we knew that some of the groups were having a hard time getting started. It was hard for us to hear their anxiety and not intervene, but we decided to hold back. Of course, if a BET fell into total confusion, we would have stepped in."

The BETs experts who followed a more structured approach did get their teams off to a fast start. In other groups, however, the experts saw their roles as raising

questions and exploring different avenues. Their approach proved hard for individuals who prefer to work within firm guidelines; they often felt confused and frustrated in the early stage of the project. "We weren't sure of what we were supposed to be doing," says one. "If we had had more concrete information and guidance, we could have made more headway at the January meeting."

That some participants started to feel anxious as early as the January meeting puzzled Steve and Masiel. Before the meeting the staff had sent the participants an overview of the project, biographies of the experts and material on the Andrus Family Fund. In addition, they again discussed the stages of the process at the January meeting. "We repeated over and over again that the BETs were a work-in-progress," says Steve, "that the teams were in the early stage, and that we didn't expect them to come up with a plan that weekend. The only explanation I have is that some people's anxieties about completing the tasks may have prevented them from hearing what we had said."

Those trustees and family members who preferred more structure were not alone. Several experts wished for more direction, too. As one said: "If I had gotten a one-page introduction before the meeting describing the specific assignment, the topics to be addressed, the kinds of information most useful to the Fund, and the backgrounds of the people I would be working with, I could have thought about the assignment before meeting with my BET for the first time."

As for other changes they would like to see instituted, one expert suggested that the staff set uniform standards for preparing the papers. "There was no need to have such long papers. The board and staff could have digested the information more readily if it had been presented in a three-page bulleted memo highlighting the main findings." Another expert recommended building checkpoints into the process: Every few months each BET would have a conference call with the staff to discuss their progress and to get feedback. The staff did have two check-in conference calls with the experts and numerous individual calls with each over the eight months. And while they listened to the BETs conference calls, they did not intervene in the conversations or ask direct questions about how the teams were progressing.

Steve and Masiel stand by their decision to err on the side of more freedom rather than less. "We feel that we covered enough of the bases to get the BETs in motion," says Masiel. "Yes, some BETs had a hard time getting going, but they were also the ones who came up with some of the best ideas in the end."

Over all, the staff was pleased with the way the BETs developed and the outcomes it produced. For a new project, it had very few snags. One change Steve and Masiel would make would be to give more preparation to the family members before the initial meeting. Several had little knowledge of foundations and none had ever sat on a foundation board. They would have benefited from a separate briefing on the Fund's grantmaking philosophy and how the BETs fitted into the grantmaking process. "We gave them information about the Fund and how the BETs fitted into the grantmaking," says Steve, "but we probably didn't do enough to educate them about how foundations operate."

In retrospect, Steve would also have paid more attention to the anxieties that some participants—including a few experts—expressed in the initial stage of the project. "I thought that we gave enough information and assurances to the teams," says Steve, "but I guess that we underestimated how anxiety-producing a free-floating creative

process can be to some people who haven't worked that way before or who prefer structure."

Part III
Adapting the BETs Model

The BET model engaged participants in a qualitatively different way from traditional approaches to educating trustees and involving family members. The experience was geared to reinforcing participants' sense of themselves as contributors to the process rather than as recipients of information. From the start, they understood that the work of the BETs would have consequences in the world. By exerting influence over the Andrus Family Fund grantmaking, their efforts would also affect the grantees and the communities they served.

"The payoff," says Steve, "is that the BETs process teaches trustees to be learning partners with the staff, which is different from being board members. Our board was engaged from the start, but now they are more so. They feel more confident and competent in presenting proposals to the board, and they are much more sophisticated in how they think about them. Now the analytical questions come just as often from the trustees as from the staff."

The trustees and family members were not the only ones educated by the BETs. The staff were, too. "We're a small staff," says Masiel. "It would have taken us a long time to gather and assimilate all this information and impart it to the trustees. The BETs allowed us to educate everyone about a range of issues in a relatively short time."

Furthermore, by including family members in the learning experience, the Fund benefited as much as the family members. Besides adding eight educated family members to the pool of candidates who may be tapped for future family service, it created a team of roving ambassadors for the Fund's work. Returning to their homes and jobs, family members will share what they learned with other family members, friends and colleagues and build interest in the work of the Fund.

The Andrus Family Fund had the resources to plan a more elaborate educational experiment. But the BETs model can be adapted to the particular needs and circumstances of family foundations of all sizes. Having created the BETs project and completed a trial run, the Andrus Family Fund staff are eager to share what they learned with other family foundations.

Planning the project

- Don't be afraid to try a process that you make up. If you think the process holds promise, take a chance on it. The project, however, must have a real purpose and participants have real responsibilities.
- Don't underestimate the ability of the board and family members to participate in a high level of conversation with experts. The better informed the trustees, the more engaged they will be in the work of the foundation.
- When including family members who are not trustees, define the length of time they will be involved in the process to avoid false expectations and disappointment when the process ends.

Finding Experts

- Most academics and community activists would welcome the opportunity to work with a family foundation and to help shape trustees' thinking about grantmaking. Experienced foundation staff can make good experts as can outstanding graduate students.
- Look for experts who have diverse expertise, divergent points of view, and different teaching styles. And, whoever you choose, be sure they possess the personality traits to be a good teacher: warmth, patience, and the ability to make each participant feel that he or she can make a contribution.

Cutting costs

- **Group size:** Three is an intimate size for a study group, but the same results could be achieved with four or five persons to a team. Larger teams have advantages: each person can be assigned a discrete task and, of course, the foundation can educate more family members at no additional cost.
- **Geography:** Few families today live in the same geographical region. However, if two or three live in close proximity, they can form a BET study group, consult an expert, and report their findings to the board.
- **Bring teams together for longer periods:** Plan a meeting or workshop that extends over three days to allow the groups to accomplish the maximum amount in one get-together.
- **Narrow the focus of investigation**: Make a list of what information the foundation needs to sharpen its grantmaking. Form a study group to focus on one item at a time. If they do not have time to do independent research, they can summarize the points from the three best papers written on that topic and include issues that arose from the team's discussion of those articles.

Following its advice to other family foundations, The Andrus Family Philanthropy Program will use the Andrus Family Fund's BETs experiment as a model for educating trustees and extended family members about the work of the other four Andrus family philanthropies. Discussions are already underway to design a BETs-style project for another of the Andrus family's philanthropies, the Helen Benedict Foundation. Because it funds projects in the field of aging in Westcester County, New York, the staff will invite extended family members ages 55 and older to participate in the educational process. "We've found an elastic model that we can shape and bend to fit the different Andrus family philanthropies," says Steve. "This next project will draw on experts, too, but they may not work quite as closely with the participants as the Andrus Family Fund experts did. We want to build in a structure that will enable extended family members to make use of what they learn when the return to their home communities. We never intended to restrict ourselves to the BETs model. Rather, we want it to be a springboard for invention and adaptation—for ourselves and for other family foundations."