

Lay It On the Line

Purpose

Most of us carry assumptions about family, wealth, and philanthropy that influence our attitudes and behaviors. Learn more about your assumptions and how to take them out of the equation in order to focus on your clients and their ability to deal with these issues. The exercise is also a good icebreaker. Lay It On the Line helps facilitate introductions. It's also a good way to dispel participants' anxieties and help them learn who else is in the room and where they stand on issues.

Objectives

- Understand our own assumptions around family, wealth, and philanthropy
- Learn how others in the room stand on these issues
- Discover how these assumptions will come up –and with whom– during your advising
- Learn how to use this exercise with clients, donors, and next generation groups

Process

- Create a Yes-No spectrum
- Participants spread out across the room along the Yes-No spectrum
- Facilitator makes a statement, and participants are asked to take a stance along the Yes-No spectrum
- Statements should be in service of the purpose and/or later agenda items

Facilitation Observations