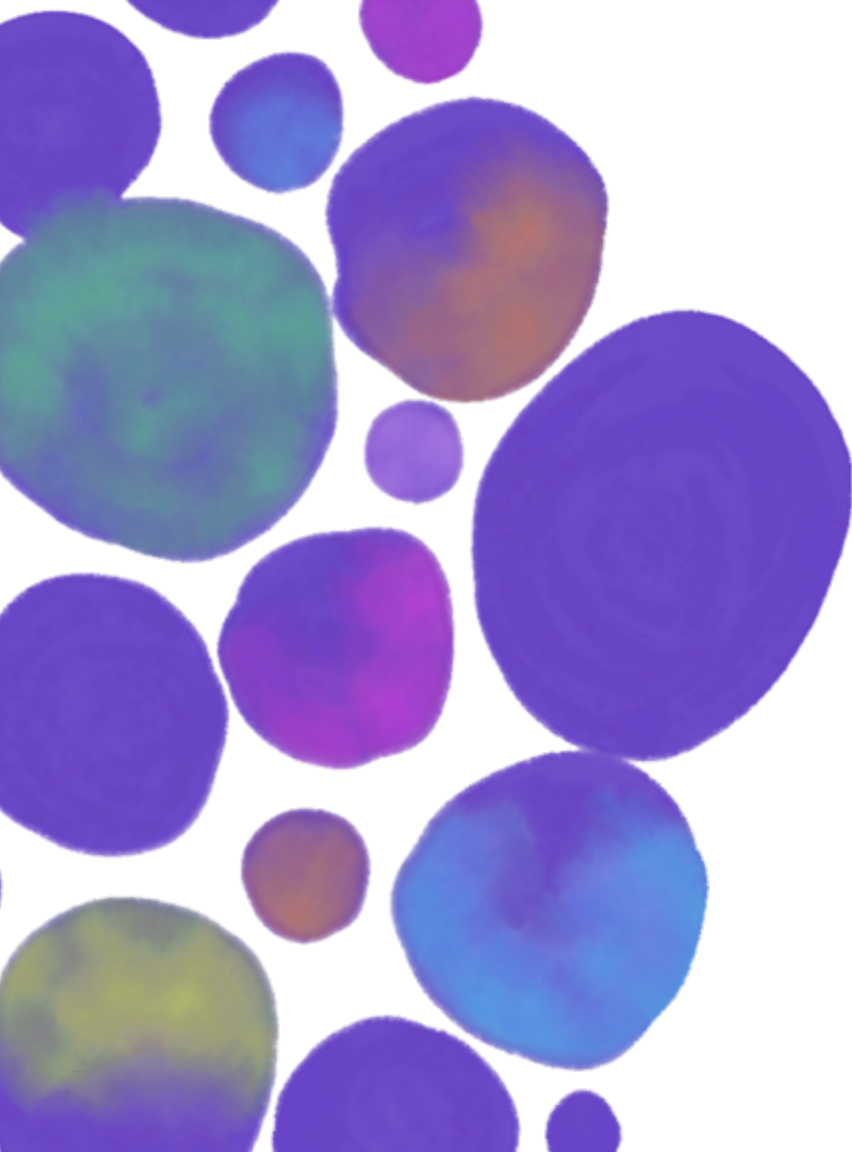


Episode #5

Intergenerational stories

PurposePhil concept book





What you'll find here

- Introduction
- 1 What is intergenerational justice? / *page 11*
- 2 A few distributive approaches / *page 19*
- 3 Applications / *page 23*
- 4 Artists reflections / *page 47*
- 5 *Reflection questions* / *page 53*

"If you ask me what is the most important thing that I have learned about being a Haudenosaunee, it's the idea that we are connected to a community, but a community that transcends time."



Rich
Hill Sr

"You have to know the past to understand the present."

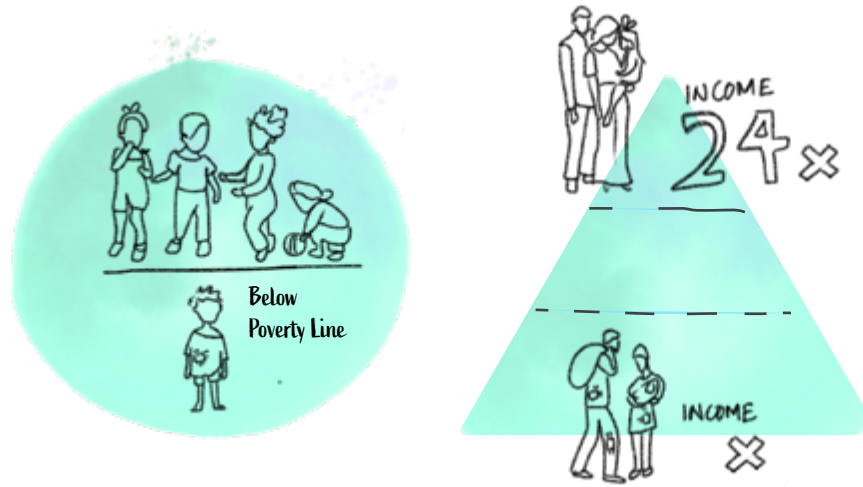


Carl
Sagan

"Those who look only to the past or the present are certain to miss the future."

John F.
Kennedy

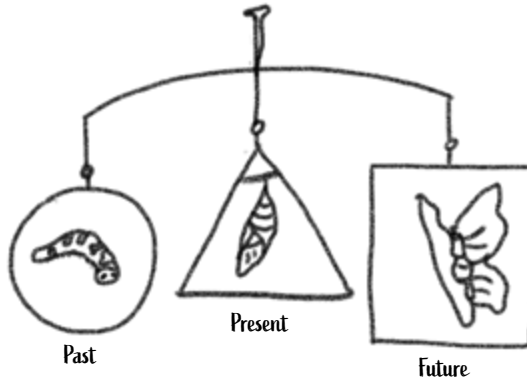
Right now, there are unmet needs all around us. And they are growing. One in five children in British Columbia lives below the poverty line, higher than the national average. Last year, B.C. families in the top income bracket made 24 times more money than families in the lowest income bracket, also a wider differential than the national average. What can and should philanthropy do? More specifically, what can and should a community foundation in British Columbia do?



- Is it the role of community foundations to emphatically respond to the urgency of the present moment by spending far more money, now, to address the needs of the day?
- Is it the role of community foundations to empathetically repair past harms that have led to today's unmet needs by spending money today to redress historic injustices?
- Is it the role of community foundations to evenly mitigate the impact of inequality by modestly spending today and responsibly saving for future generations?

In other words, *how much* should a foundation look back, look at today, and look ahead? Is there an optimal balance of past, present, and future thinking & action? Baked into the institutional design of philanthropic foundations are assumptions about time, and whose interests are centered over that time.

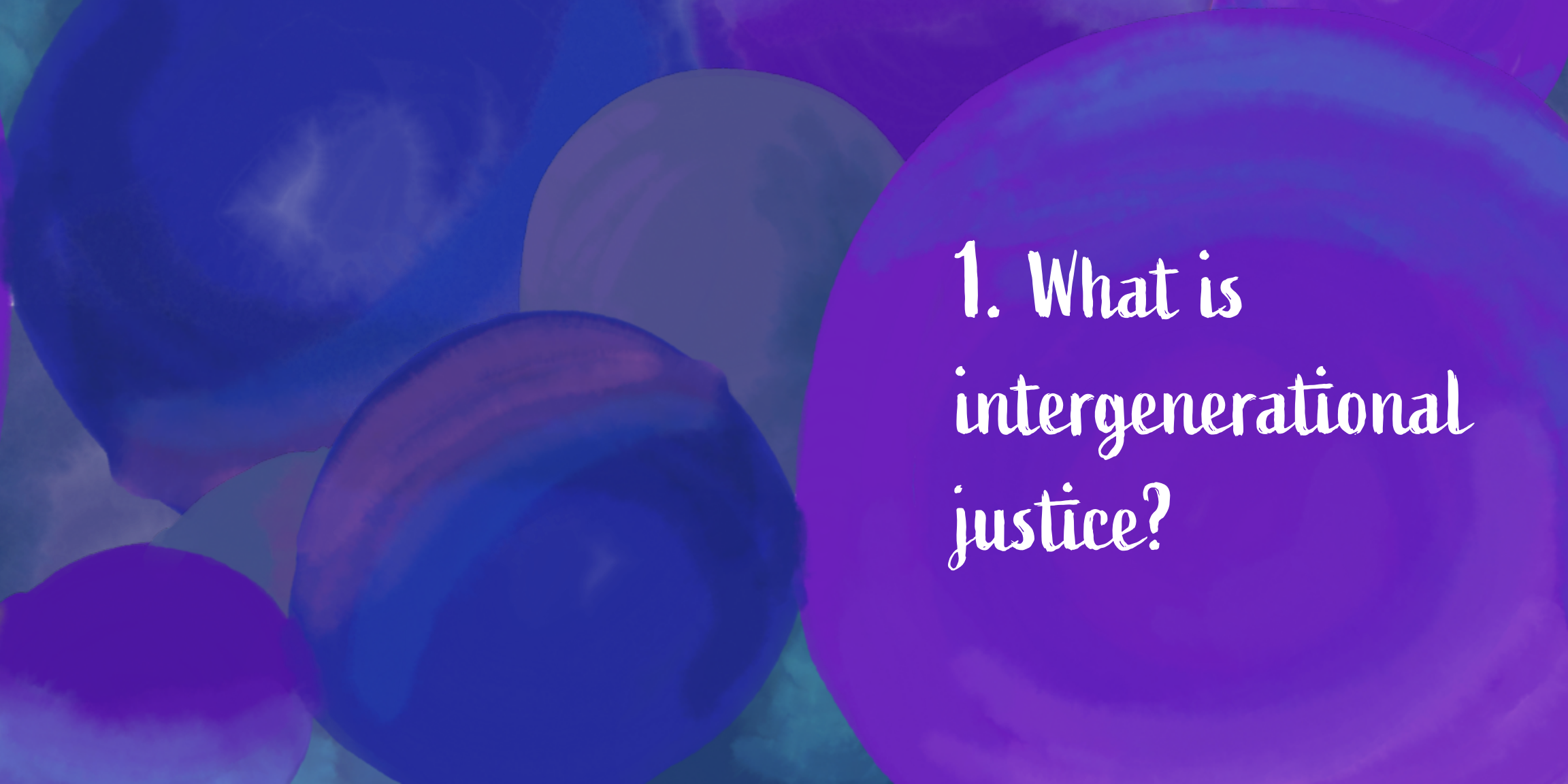
Tax credits, perpetual endowments, and disbursement quotas set-up relationships between present and future generations, and individual past donors. As a donor, you can establish a philanthropic fund today, receive a tax credit this year, make modest allocations to the current generation, save for future generations, and if you so choose, oblige future generations to allocate those savings in ways that fulfil your values and interests.



In prior modules, we've explored the tangled web of relationships between philanthropy, the state, the tax system, donors, charities, non-profits, grassroots groups, and people in need. In this module, we examine those relationships over time, introducing the concept of intergenerational justice.

Is a foundation tied to the past through its donors' wishes, or through the descendants of prior generations harmed by the creation and accumulation of philanthropic wealth? And/or does a foundation owe something to future generations not yet born? And if so, what is that something? Is it money, wellbeing, natural resources, functioning democratic institutions, etc.?





1. What is
intergenerational
justice?



Intergenerational justice considers relations between generations. Core questions include:

Whether present generations have a duty to consider past and future people.

What kinds of responsibilities exist between present, past and future people ?

What is owed to repair past injustices ?

We can distinguish between different kinds of responsibilities to past and future generations. Simon Caney in his article, *Justice and Future Generations*, outlines at least four types:

Economic responsibilities.

This is about the distribution of income and wealth, including debt.

Ecological responsibilities.

This is about the use of natural resources and the creation of environmental threats -like climate change, biodiversity loss, and overpopulation.

Bioethical responsibilities.

This is about the health and wellbeing of present and future generations - where, for example, the use of antibiotics in this generation might increase drug-resistant infections that hurt future generations.

Political responsibilities.

This is about the design of political institutions and the responsibilities of current generations to correct for past injustices and protect democratic institutions to safeguard human rights into the future.

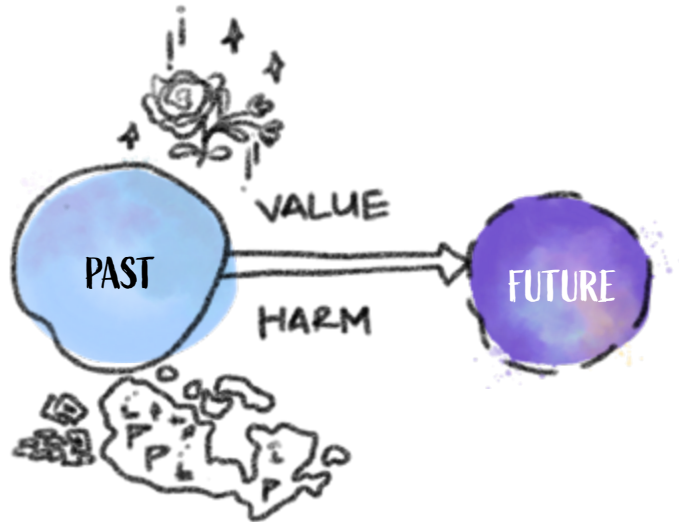
One of the hard-to-wrap-your-head-around features of intergenerational justice is the **absence of direct reciprocity between people across generations**. We are not in direct relationship with deceased generations. And we will not be in direct relationship with future generations who are yet to be born, or who might not be born because of our actions today.

That means there is a permanent asymmetry in power relations between living people, those who lived in the past, and those who will live in the future. Couple that with what we know about human psychology -- that we find it harder to be motivated by far away concerns -- and we can see why short-termism so often prevails.



Philanthropy is one of the few institutions predicated on a longer-term view. Indeed, a core value proposition to donors is legacy -- the idea of passing along something of value; of ensuring an indelible link between past and future.

But, it's not only benefits that can be passed along. It's also the accrual of harm. Harm might be in the form of money acquired and amassed as a result of land theft, resource extraction, human exploitation, and/or policies that disproportionately privilege a few. Harm might also be in the form of upholding an image of benevolence in the face of continued dominance and oppression.



Indeed, questions of intergenerational justice focus not just on divvying up material resources, but also on distributing capabilities, happiness, honors & obligations, and harms.

- **Resources:** Concerns the distribution of money, goods, services, property.
- **Capabilities:** Concerns the distribution of real freedoms (the means) that people have to do or be what they wish (their desired ends)
- **Happiness:** Concerns the distribution of desired ends like happiness and wellbeing
- **Honours & Obligations:** Concerns the distribution of status, duty, responsibility
- **Harms:** Concerns the distribution of losses, offenses, and retribution

While there aren't obvious answers about how to achieve intergenerational justice, arguably philanthropy, with its inbuilt past-present-future orientation, is well positioned to at least open-up a more fulsome conversation. Only by making assumptions transparent and wrestling with different distributive approaches might we more fairly calibrate benefits and harms over time.



2. A Few Distributive Approaches

	What it says	Role of philanthropy	Focus
Sufficientarianism	We have a duty to foster the conditions for future generations to have a decent minimum standard of living.. Inequality within and between generations is OK provided a floor is met.	The role of philanthropy might be to ensure present and future generations get to a base minimum.	Focus on redistributing resources to a minimum threshold
Relational Egalitarianism	We have a duty to realize a society in which all are treated as equal and in which there is no domination, exploitation, or oppression. In this approach, we are OK with some people having more than others as long as that inequality does not result in stigma or oppression.	The role of philanthropy might be to advocate for the equal distribution of rights and freedoms, pursue injustice, and future proof democratic institutions	Focus on repairing past injustice, and securing rights and capabilities
Luck Egalitarianism	It is unjust and unfair for some people to be worse off through no fault of their own. So it is our duty to pass on a world that is in no worse shape than it is now. Future generations' standard of living must be at least equal to ours.	The role of philanthropy might be to conserve and protect resources, acting as a 'custodian' rather than an 'owner' of both natural & material wealth.	Focus on protecting ecology, divesting from extractive economies
Seventh Generation Thinking *Based on Haudenosaunee principles	Communities transcend time so all decisions must take into account seven generations into the future, centering seven grandmother teachings of wisdom, humility, respect, truth, bravery, love, and honesty.	The role of philanthropy is to put into practice seventh generation thinking and seven teachings.	Focus on ethical personal and institutional decision-making



3. Application

So how are foundations and private trusts grappling with questions of intergenerational justice? On what time horizons are they putting their focus? In the podcast episode “Intergenerational stories” we hear from practitioners John Borrows from the University of Victoria; Dace West from Denver Foundation; Cuong Hoang from Mott Philanthropic; Vicky Stott and Oronde Miller from the W.K. Kellogg Foundation; and Yonis Hassan from the newly established Justice Fund.



John Borrows



Cuong Hoang



Oronde Miller



Dace West



Vicky Stott



Yonis Hassan

Time Horizon

Past Focus

Strategies

we hear about in the podcast

- Establishing financial reparations funds

Present Focus

- Spending down endowments
- Investing in truth telling & racial healing
- Engaging investment firms & corporations
- Implementing racial equity frameworks

Future Focus

- Rotating roles and committing to ritual

Past Focus

The bedeviling social issues of our time can be traced back in time to longstanding patterns of inequality, colonization, racism, exploitation, and marginalization.

If we accept that the roots of our present day social ills are historical, then we might say there are both pragmatic and moral obligations to redress past wrongs. Pragmatically, we are unable to make progress on the issues of the day without attending to their many causes. Morally, remedial action is at the heart of justice.



Remedial action covers a wide range of financial, legal, psychological, political, and civic practices. Margaret Urban Walker, in her article “Making Reparations Possible: Theorizing Reparative Justice,” describes the diversity of reparations that emerged in the later 20th century -- first introduced by West Germany to individual survivors of the Holocaust, later to the victims of brutal military regimes in Chile and Argentina, and most recently, to Black residents of Evanston, Illinois whose families endured slavery, red-lining, and present-day housing segregation.

While restitution and compensation play a critical function, there are other essential dimensions of reparations including actions that illuminate and dignify those who have endured injustice, and actions that mark a public commitment to structural reform so that the suffering is not repeated.

Walker writes,

“Several new approaches ...have emerged. They have in common a focus on the role of reparations (and other post-conflict or transitional measures) in reconfiguring or reconstituting the flawed moral and political relationships that invite abuses and are revealed by the specific forms abuses take. The point is not restoring the status quo ante but affirming a new baseline for moral and political engagement going forward... **Many of these see reparations as establishing new relationships of recognition, trust, equality, respect, atonement or reconciliation.**

The central idea of my own view is that reparations are about demonstrating (rather than establishing) relations of accountability and reciprocity that no process or program of reparations can itself guarantee.

*Reparations are a medium for the contentious yet hopeful negotiation in the present of proper recognition of the past and proper terms of relation for the future. **As such they require mutually reinforcing commitments in multiple registers of relationship: money, acknowledgement, public ritual and social change.***”

Case Study: Denver Foundation

For a group of white donors at Denver Foundation, whose intergenerational wealth could directly be traced back to the slave trade, reparations takes the form of hands-off granting to Black leaders and entrepreneurs, acknowledgement, and public learning. By ceding control of granting decisions to a group of Black leaders and entrepreneurs, the donors are recognizing their positional power, while not letting themselves off the hook for further engagement.

Through regular learning sessions and conversations, they are opening themselves up to what Walker calls “the possibility of a relationship of accountability and reciprocity.” That possibility, she argues, is the fundamental task of reparations.

Case Study: Bush Foundation

While not all funders can trace their wealth to specific wrongdoing, some funders like the Bush Foundation in St. Paul, Minnesota, recognize their wealth to be a product of public policy which has long privileged White, wealthy folks. To try and close the racial wealth gap, they have issued \$100 million in social impact bonds and allocated all of the proceeds to two trust funds: \$50 million for Black people and \$50 million for Native American people.

The money will be paid to individuals for developing their wealth - in ways like financing a college education, making a down payment on a house, or providing seed money to start a business. An additional \$50 million has been allocated to systemic change initiatives focused more on public ritual and structural reform.

Activities with past focus

- ☐ Undertaking deep historical research
- ☐ Tracking & publicly acknowledging the sources of wealth
- ☐ Creating partnerships with racialized community leaders
- ☐ Issuing social impact bonds
- ☐ Setting up financial reparations or trust funds
- ☐ Hosting open-source learning events

Present Focus

Reparations seek to make amends for past wrongdoing. But, what happens when there is not a clear line between past and present injustice, and harm continues to accrue? For Cuong Hoang, who runs Mott Philanthropic, **a meaningful reparations framework helps us rethink how we redistribute resources, today, along a spectrum and not a threshold.** Here's Cuong in his own words:



Cuong

“So the reparations framework historically has been really centered on two facts of American history. The first one is the wholesale stealing of land from Indigenous people. And the second was the mass forced migration of people of African descent to the US. Those are really important foundational realities in American history that need repair associated with them. But one of the things that I think a just transition framework helps us understand is that those harms have continued...”

And there are additional harms that continue every day through the extraction of wealth from working people, the extraction of wealth from lands, rights of mining, and other ways in which positive energy is being extracted from people. So all of those things require repair as well. They might not be repairs that are centuries old; they could just be decades old. They might not be repaired at the same magnitude that needs to happen recognizing the history of Indigenous peoples and slaves in our country, but they are repairs themselves. Thinking about reparations from this larger definition can help us to understand how resources might be allocated.

The problem or the challenge that philanthropy often encounters is exclusionary thinking, rather than spectrum thinking. So philanthropy asks: who are the people who don't have access to health care? Who are the people who live in food deserts? It ends up often being a black or white type of analysis. Whereas the reality is we all exist on a spectrum: Are you hungry every day or do you have a full belly every day? And there's tons of people in the middle, who might not live in a food desert, but there are times that they don't know they have a next meal, or they might be hungry. And if we can think about that spectrum that might lead us to different answers about the way society should be organized in order to meet people's needs...

Widening the viewfinder and addressing how society is organized has become core to the work of the **Chorus Foundation**, whom Cuong advises. When Chorus Foundation shifted its purpose from climate change to just transitions, it also shifted its strategy from grantmaking in perpetuity to spending down its endowment over a decade. Their rationale? If they didn't generously invest in enabling communities to transition from extractive to regenerative ways of being, now, their dollars would become less effective, if not inconsequential, over time.

That's the same strand of thinking that animates Yonis Hassan and his work at the **Justice Fund**. He wants to see all foundations have an expiry date. For him, the way to ensure a fair and equitable future is to dedicate all current philanthropic resources towards risk capital, and then to move out of the way and enable governments to take new social models to scale.

“ The job, the justification of the existence of the philanthropic industry that we are living in right now is to... fund innovation, to fund risk, not to ensure its financial sustainability. ”

Yonis Hassan

Vicky Stott and Oronde Miller at the W.K. **Kellogg Foundation** aren't calling for an end date to philanthropy, but they do see a need for philanthropy to deeply invest in healing, right now. For them, healing proceeds transformation. Without deep opportunities for truth telling, acknowledgement, catharsis, and relationship building, systems are doomed to repeat past harms.

Why? Because you can't construct a future without laying a different relational foundation. Rather than emphasize financial reparations, Kellogg Foundation emphasizes relational repair. They fund a network of healing practitioners, gatherings, and storytelling sessions within communities, corporations, investment firms, and even their own foundation.

As Margaret Urban Walker explains it, “It is a renegotiation of relationship that reparations always symbolize and promise: they are an attempt in the present to acknowledge and repudiate what happened before, and to begin transformation by attempting a first step, here and now, towards defining and creating relations of accountability and reciprocity.”



Activities with present focus

- ☐ Convening local communities for deep healing work
- ☐ Curating a network of healing practitioners
- ☐ Enabling truth telling & story sharing including about the role of foundations
- ☐ Crafting new narratives
- ☐ Running radical experiments
- ☐ Advocating for hyper-local policy change
- ☐ Offering operational rather than project funding, along with sub-granting to grassroots groups
- ☐ Engaging corporations, investment firms and media

Future Focus

Fostering relations of accountability and reciprocity is at the heart of a seven generation, seven teachings approach, integral to Indigenous communities like the Haudenosaunee and Anishinaabe.

Only you can't so neatly parcel the past, present, and future. As Rick Hill, former chair of the Haudenosaunee Standing Committee, shares:

"We're connected to the first Indians who walked on this earth, the very first ones, however long ago that was. But we're also connected to those Indians who aren't even born yet, who are going to walk this earth. And our job in the middle is to bridge the gap. You take the inheritance from the past, you add to it, our ideas and your thinking, and you bundle it up and shoot it to the future. And there is a different kind of responsibility. That is not just about me, my pride and my ego, it's about all that other stuff. We inherit a duty, we inherit a responsibility..."

That inherited duty calls for balance and restraint. Material and non-material resources should be protected and carefully stewarded over time. Within this frame, charitable trust law and perpetual endowments are helpful mechanisms for looking after resources over the long-term. While spending down endowments is not so consistent with a seven generation, seven teachings approach, neither is growing endowments in ways that deplete environments and compromise relationships. Indeed, the spirit with which dollars are saved and spent really matters.



John Borrows, Chair of Indigenous Justice and Governance at the University of Victoria, describes the importance of ritual and rotating leadership when making long-term distributive decisions. The intentional use of ceremony including smudges, pipes, and songs brings a mindfulness to decision-making that is often lost in the day-to-day grind of institutions.

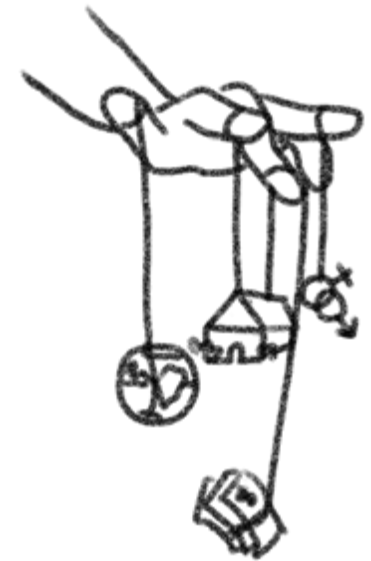
The fixed hierarchies of institutions also stand in the way of balanced decision-making. Instead of power vested in people who occupy particular positions -- like board chair or CEO -- power rotates amongst multiple chiefs, who regularly step up and down in their community. At one moment they are in the role of giver. At another moment they are in the role of receiver. There is an ongoing choreography of reciprocity.



Rotating Leadership

While there is some overlap between Indigenous approaches and charitable trust law, reciprocity isn't the central tenet of current legal frameworks so much as control. With donor advised funds, for example, individual donors have the right to set the terms & conditions of where their dollars go, even after they die.

How much should donor intent determine future resource allocations?



Chris Abbinante, in his piece on *Protecting Donor Intent in Charitable Foundations*, argues that donor intent is both a critical legal obligation and a core motivation to give. He argues that generosity is related to the level of control, writing,

“Without extensive donor control, the use of foundations as a vehicle for philanthropic activities is likely to diminish greatly.... [Because] when people create charitable trusts, the law permits them to extend ‘dead hand’ control. This exception can best be described as a bargain: as an incentive for people to donate their wealth for the public welfare, the law permits them to specify the use of that gift perpetually.”



Protecting Donor Intent in
Charitable Foundations,
Chris Abbinante

In the absence of explicitly changing this basis of exchange, Abbinante says ignoring or circumventing donor intent throws up ethical and pragmatic concerns. Besides, he pushes back against the claim that adherence to what donors want is inversely related or mutually exclusive with the common good. Provided that a donor's intent is not illegal or impractical, it affords some sort of direction in an otherwise muddy arena. Because there is little consensus on what constitutes the common good, Abbinante asks:

Why shouldn't we go with the donor's point of view?



One response might be found in Indigenous teachings, which focus on the relational over the individual. Donor advised funds and private charitable trusts focus on the individual and their property. The donor is enshrined as the donor, forever. There is no exchange of roles. The purpose becomes upholding the interests of an individual, rather than upholding the interests of the community of which the individual is a part.

So what might it look like to honor intentionality over individual donor intent?

Activities with future focus

- ☐ Sharing Wendigo stories (stories of greed and over consumption)
- ☐ Committing to ceremony and ritual
- ☐ Rotating leadership
- ☐ Divesting from extractive and consumptive investments
- ☐ Prioritizing regenerative growth
- ☐ Renegotiating donor intent



4. Artists' reflections



Episode #5: Intergenerational stories

Episode cover by Randall Bear Barnettson

When I think about Intergenerationality I am immediately reminded of the seven generations teachings of my Elders. In this teaching, we (the present) are connected to the past three generations, as well as the 3 generations to come. With ourselves being the sacred center, totalling seven generations. We are both connected to, and responsible to these other generations. The past and future are not linear, but cyclical, in this way everything is connected. So we must do our part to ensure that our children's children's children will have a healthy way of life on the land, and with the people around them. Just as we look to our ancestors who did the same for us.

I chose the image of a double Eagle to show the connectedness of both past and future. That they mirror one another and are more similar than we understand.



Episode #5: Intergenerational stories

Complementary piece by Kyla Yin James

With the theme of intergenerational stories, I was struck by how the present is affected by the past and future. Past, present, and future seemed to come together to create a whole picture. This led me to imagine all 3 connected and coming together in a circle, along with the environments that hold us. The use of perspective suggests that this circle exists in multiple dimensions and holds nuance. Each part is distinct, but the circle isn't complete without everything in relation to each other.

The background of the slide is composed of numerous overlapping circles in various shades of yellow and orange, creating a vibrant, abstract pattern. A large, semi-transparent orange circle is positioned on the right side, serving as a backdrop for the title text.

5. Reflection



REFLECTIONS Looking Inside

Experiences & Observations

1. How do you think about your personal responsibility to past, present, and future generations? When you give, what time horizon are you focused on, and why?

Reactions & Impressions

2. What perspectives did you find yourself glossing over versus what perspectives provoked strong reactions? Why might that be? What are some of your own default logics when it comes to how wealth is accrued, saved, and distributed over generations?

Questions & Hunches to Test

3. John Borrows talks about love and humility as two of seven grandmother teachings, or ethics. How is that different from the ethic of individual wealth, control and responsibility? How could you explore these different ethics in your own life?



REFLECTIONS Looking Outside

Experiences & Observations

4. How does Vancouver Foundation think about its responsibility to past, present, and future generations? Where do questions of intergenerational equity & justice show up in the day-to-day?

Reactions & Impressions

5. This module introduced us to a range of intergenerational strategies - from financial reparations, to racial healing work, to spending down endowments, to creating rituals for the long-term stewardship of endowments. Which strategies feel possible and preferable for Vancouver Foundation, and why might that be?

Questions & Hunches to Test

6. How might Vancouver Foundation better understand the link between present-day social challenges in B.C. and past decisions, policies, and sources of philanthropic wealth?

How might Vancouver Foundation explore obligations to past donors versus obligations to future generations?

Intergenerational stories / PurposePhil

Concept Book / Episode #5



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