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Bringing Legacy to Life: How Video Storytelling Inspires Multigenerational Involvement in Family Philanthropy

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Introduction

“A picture is worth a thousand words.” Many of us are familiar with the expression. For family foundations, old photo albums are a rich resource for helping staff, grantees, and community stakeholders understand their history. But what if we were to take that a bit further? A 2014 study by Forrester Research found that one minute of video is worth 1.8 million words (Marketwired, 2014). Video, then, can help these foundations capture the story of their donor intent and legacy and use it to inspire involvement in their mission.

This article presents how a donor legacy video can help inspire multigenerational participation in the governance of a family foundation. The experience of the Marion I. & Henry J. Knott Foundation, a family foundation founded in 1977, serves as the backdrop for this examination. We explore the power of video in preserving family stories, the goals and outcomes of the Knott Foundation’s video project, and some practical suggestions for other grantmakers who wish to share their legacy in this way.

The Power of Video Storytelling

Most foundations go through some sort of process to define donor intent and formalize their values, whether at the beginning of their life span or after their founders’ passing. Video is a powerful tool in that process, vividly bringing stories to life for both older and younger family members. This section discusses why capturing family stories is so important to a family and

Key Points

- Most family foundations go through some sort of process to define donor intent and formalize their values, whether at the beginning of their life span or after their founders’ passing. Video is a powerful tool in that process, vividly bringing stories to life for family members, older and younger alike. So how can video help foundations capture the important story of their donor intent and legacy, and use it to inspire future involvement in their mission?
- With the experience of the Marion I. & Henry J. Knott Foundation serving as the backdrop, this article examines how a donor legacy video can not only help inspire multigenerational participation in the governance of a family foundation, but also extend multiple direct benefits to grant applicants and grantees.
- Grounded in research and reflective practice, this article details the power of video in preserving family stories, the goals and outcomes of the Knott Foundation’s successful video project, and some practical suggestions for other family foundations.
- Key findings show that video storytelling can inspire new board member participation, enhance everyone’s understanding of the founders’ legacy, and benefit a foundation’s wider grantee community.

their philanthropic legacy. We also examine the benefits of using video as one component of a strategic communications plan to document and share the donor intent of a family foundation.

Three Reasons to Capture Family Stories

Capturing family stories through a donor legacy video, or through other legacy projects, is an important part of the evolution of a foundation as well as the evolution of a family. In fact, the stories that underpin the legacy of a family foundation's original donor often overlap with the stories that bind a family together. These stories can also help inform nonfamily members who serve the foundation by creating a shared sense of donor intent. Here are three clear reasons why capturing family stories is important to any family philanthropy.

Stories keep families together. It is important for families to understand where they come from, how they have withstood adversity over time, and what their family values are. In fact, that understanding — transmitted through stories passed on from generation to generation — may be more important than you think. In his essay “The Stories That Bind Us,” New York Times columnist Bruce Feiler (2013) argued that a family's storyline is the most valuable element to making a family effective, resilient, and happy: “The single most important thing you can do for your family may be the simplest of all: develop a strong family narrative” (para. 11). Family foundations have a meaningful role to play in this narrative, and creating a donor legacy video is one way to preserve some of the family stories that illustrate the values and resilience of previous generations.

Stories provide moral guidance. “For centuries and centuries, stories have been the best means of explaining and passing on the moral values a family or people wishes to retain” (Pellowski, 1987, p. 1). The ability to pass on values and provide moral guidance from generation to generation is an important benefit to capturing family stories, and a particularly important element for family foundations in the business of engaging the family in giving back to the community. As Sharna Goldseker and Michael Moody (2017) acknowledged in *Generation Impact: How Next Gen Donors Are Revolutionizing Giving*, “The transmission of philanthropic values within families is often closely connected to the most significant family stories” (p. 178).

Most foundations go through some sort of process to define donor intent and formalize their values, whether at the beginning of their life span or after their founders' passing. Video is a powerful tool in that process[.]

Indeed, family stories inform the values that support a family's charity and provide a platform for each generation to shape how their descendants see themselves in the world. For example, in the Knott Foundation's donor legacy video, there is a story about how the School Sisters of Notre Dame helped raise founder Henry J. Knott's mother after her parents passed away when she was quite young. He never forgot the kindness shown to his mother by the nuns, and it became a major motivating factor of his philanthropic support for the Catholic activities sector.

Stories engage the next generation. Family foundations often want to know how their work is going to remain relevant and appeal to young people who have competing priorities. In their blog post “What the Next Gen Really Wants,” Moody and Goldseker (2018) identify the primary tool in engaging the next generation:

Tell the family story. ... The next generation want[s] to be good stewards of family legacy, but to do so they need to know the family story. They need to be able to find their place in the family's narrative. This can be incredibly empowering to them as well, as it helps them connect their philanthropic identity to something bigger. (para. 14)

Clearly, foundations have the opportunity through storytelling to engage future generations in their work. After viewing the Knott Foundation's donor legacy video, a Knott

[S]tories not only help illustrate the motivations for a family's philanthropy, they also help build family unity, provide moral stability, and involve future generations more meaningfully in the family's work.

grandson who serves as a trustee of the foundation commented,

One story that stood out to me was when a woman came back to my grandfather after she graduated nursing school to set up a repayment plan [for the tuition money he had loaned her] and he responded, "Just be a good nurse." I think this epitomizes his generosity. He wanted to help others who needed assistance, but didn't ask anything in return.

In short, family stories are an integral part of a donor's legacy. The added benefit, of course, is that these stories not only help illustrate the motivations for a family's philanthropy, they also help build family unity, provide moral stability, and involve future generations more meaningfully in the family's work.

Why Video?

There are many benefits to using video to capture a donor's legacy, and some avenues where video outperforms other media, such as the written word, scrapbooks, family archives, or online curation tools. (See Figure 1.)

First and foremost, video has a strong emotional appeal. Manning (2016) argues that while text is often most effective on an intellectual level, video engages the viewer more viscerally: "Video satisfies our physical need for visual stimuli while allowing us to connect more deeply with the subject matter" (para. 2). For many of the same reasons that in-person communication is often preferable to email or text, video aids in






understanding speakers' body language, witnessing their facial expressions, and hearing vocal nuances in their telling of a story. All of these can be important elements when documenting the story of a donor or family, where an emotional connection can establish stronger ties to the mission of the foundation.

Video is also a strong learning tool. Two learning theories — the "learning pyramid," developed by National Training Laboratories (n.d.), and the "cone of experience," developed by Edgar Dale (1969) — argue that a person's retention of information is impacted by the way that information is presented. Dale's model demonstrates that people remember only 10 percent of what they read, but 50 percent of what they see and hear. Combine this finding with the statistic that 65 percent of people are visual learners (Gillet, 2014), and video becomes a powerful tool for learning.

Perhaps equally as important to family foundations, however, is that video provides a time capsule of sorts for this learning to take place over time. Video preserves voices and faces and brings old photos and memorabilia to life, thereby becoming a helpful tool for current and future trustees, as well as the general public, to learn about and embrace the mission, history, and soul of a foundation.

From a pragmatic perspective, video is an efficient way of sharing a message. It relays material faster than the written word — research has shown that the brain processes visual data 60,000 times faster than text (Boatman, 2017). In addition, video is easily shareable online via multiple platforms, such as websites and social media, so it can reach a wider audience. There is also an opportunity to repurpose video to benefit multiple parties. For example, by sectioning out small segments of a larger story and providing those segments to others for their own communications, a video about a single foundation can end up being useful to several organizations. The many practical applications of video make it an effective medium for nonprofit foundations seeking more value for their money.

FIGURE 1 Benefits of Video as a Tool to Document Donor Legacy

 Emotional Connection	 Learning Tool	 Historical Preservation	 Efficient Messaging	 Unified Story
<ul style="list-style-type: none"> Engages viewers on a more visceral level Aids in understanding the body language of speakers Picks up on vocal nuances of speakers telling a story 	<ul style="list-style-type: none"> Provides a visual and auditory learning experience Supports retention of information 	<ul style="list-style-type: none"> Preserves voices and faces over time Brings old photos and memorabilia to life 	<ul style="list-style-type: none"> Relays material faster than the written word Easily shareable online via multiple platforms Repurposes material to benefit multiple parties 	<ul style="list-style-type: none"> Weaves together information from multiple sources into one cohesive story Creates a centralized collection of family memories

Finally, video has the power to weave together an abundance of information from multiple sources into one cohesive story. Families collect memories in many ways: photo albums or scrapbooks of family history; blogs, Facebook groups, or other online platforms; file cabinets and basement storage boxes. A well-produced video puts the most important items from these collections into one place and, in the process, transforms many pieces of discrete information into a single and richer body of work. This ability to create a unifying message that all can experience is a strong selling point for video, especially for family foundations where historical records may be in the hands of family members across multiple states or countries.

In short, video is a medium of choice for families seeking to document and share donor legacy because of its capacity to capture emotion and nuance, to engage the viewer in more active learning, to be shared widely across multiple platforms, and to create a unifying storyline for the foundation and family.

The Knott Foundation Video Project

The Knott Foundation produced a donor legacy video in 2016 as the capstone project in a multi-year effort to further define donor intent and bring to life the vision and values of the founders.

Legacy is a powerful word. It is especially significant in the context of a foundation designed to exist into perpetuity, like Knott, where it will undoubtedly be up to future generations to read into the donors' motivations and intent, and to have some degree of confidence that their original wishes are being carried out.

Goals of the Donor Legacy Video

The purpose of the Knott Foundation's donor legacy video project was to tell the story of its founders, what motivated their philanthropy, how multiple generations of the Knott family are involved in the foundation's work today, and how the founders' vision and legacy continue to strengthen the community in and around Baltimore. As part of this purpose, it is important to note that while the founders died more than

[I]t became important to give every generation a way to understand and relate to the founders, and to hear about the life experiences that shaped their giving philosophy and resulted in the establishment of the foundation over 40 years ago.

a decade ago, a continued emphasis has been placed on keeping the spirit of Marion and Henry Knott deeply rooted in the work of their foundation and its all-family board of trustees.

In telling this story through a documentary-style video, the board had many goals:

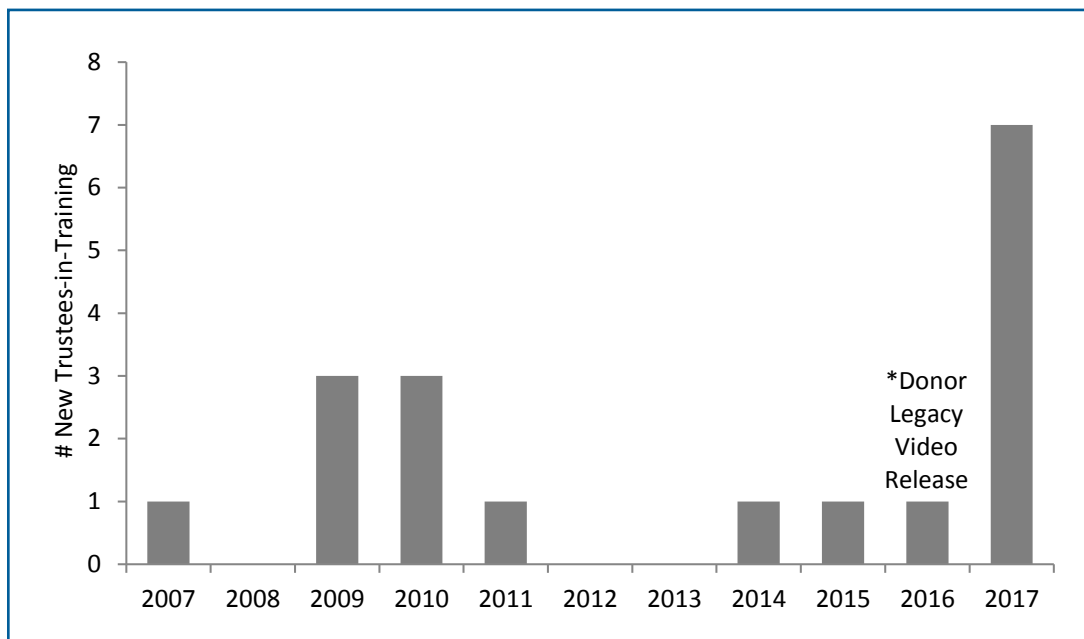
- **Bridge generations within the family.** There are three generations on the Knott board. Naturally, people of different ages had different relationships with the founders. Some trustees joining the foundation today, for example, had no relationship with the founders because they only recently married into the family. Therefore, it became important to give every generation a way to understand and relate to the founders, and to hear about the life experiences that shaped their giving philosophy and resulted in the establishment of the foundation over 40 years ago.
- **Create a shared understanding of donor intent.** With 30 family members serving as Knott trustees, there are multiple perspectives in the boardroom. The donor legacy video was an effort to marry those voices into one, unified storyline about the founders and the foundation and, in doing so, allow all trustees — no matter their generation or whether they were descendants of the founders or those descendants' spouses

— to feel part of the spirit of the Knotts and confident that the direction of the foundation was in line with their intent.

- **Inspire participation in the work of the foundation.** A hallmark of the Knott Foundation is the family's active participation in its work. Trustees not only serve as the governing body of the organization, they also take on the role of volunteer program officers, investigating more than 50 grant requests each year, conducting in-person site visits for each request, and preparing formal reports and making funding recommendations to their fellow trustees each grant cycle. As such, the foundation benefits from an army of family members who provide the human capital necessary to conduct its charitable work. A goal of the video, therefore, was to inspire more family members to join the foundation and take part in this meaningful way to connect to the community and volunteer their time and talent.
- **Celebrate a milestone.** In 2017, the Knott Foundation marked 40 years of giving. This anniversary provided a welcome chance to pause and reflect on the foundation's history, accomplishments, and future aspirations. A goal of the video was to help celebrate this milestone with trustees, the Knott family, and the community at large by sharing the foundation's mission and story with them in a more engaging way. Specifically, the video was presented at an event designed to expose family members to the work of the board, and it was shared electronically with grantees, other funders, and interested constituents through the foundation's online newsletter and website.

Tools for Sharing the Legacy

Video storytelling wove together multiple media that had been collected and curated over time. This included one-on-one interviews of the children of the founders, conducted in 2013, and the resulting donor-intent values framework that encapsulated the Knotts' motivations for their giving to the community. Biographical research

FIGURE 2 Participation in the Knott Foundation's Trustee Training Program, By Year

commissioned by the Knott Scholars Fund, a separate organization with the same founders, was also used in the video, and a large archive of photographs and newspaper articles about the founders and their philanthropic gifts was available to inform the video's storyline.

The process of creating the video started with a board-level conversation about the value of such an effort. The executive committee of the board oversaw the project. The committee and staff mapped the story they wanted to tell and the desired deliverables. After issuing an RFP to several production firms, a producer was selected, a budget was put in place, and the foundation embarked on pre-production planning meetings, scheduled filming days, and went through a post-production editing process where the executive committee and staff could comment on the video's evolution. The final work product included a long documentary (35 minutes), a short promotional film (six minutes), and three brief features about Knott grantees (two to three minutes each).

Outcomes of the Legacy Project

The Knott Foundation's donor legacy video project met its goals and, in fact, exceeded expectations in many respects. The outcomes were most significant in inspiring board participation, enhancing the understanding of the founders' legacy, and benefiting the wider Baltimore community.

In terms of participation, the foundation gained seven new board candidates after showing the video to prospective trustees. (See Figure 2.) One of those candidates has completed the yearlong orientation program and become a full voting member of the board; the others are still in the training process. Notably, they are all between the ages of 25 and 35 and bring a "next gen" perspective to the board. Their participation has also added representation from a family branch that had not been active in the foundation for some time. The donor legacy video was the catalyst for these members, who now had a shared experience of learning about their

[T]hese stories from nonprofits featured in the video were meaningful to both the family and the community, and helped inform and inspire multiple stakeholders about the impact of each organization as well as the foundation's giving.

great-grandparents, to commit to involvement in the work of the family foundation.

The trustees' understanding of the Knotts' legacy was also enhanced. In responses to a survey, trustees and trustee candidates remarked:

- “The video allowed me to really understand my great-grandparents’ beliefs, which in turn explained why and to whom our founders decided to give their money Their deep faith and roots in Baltimore inspired a lot of their giving.”
- “Being an in-law in the third generation, the video helped humanize the founders of the foundation a bit more as I never met them. It served as a good reminder of the fact that we are stewards of the founders’ gift to both the foundation and the community, and that there should be a sense of obligation to the founders to do the best possible job as a trustee.”
- “I think the biggest takeaway that I had from the donor legacy video was learning about my great-grandparents’ upbringings [and] humble beginnings, and hearing their children and grandchildren speak of them. Being very young when my great-grandparents passed away, I never truly had the opportunity to develop a type of relationship with them that a family member of an older generation may have.”

- “While having not been able to experience my great-grandparents on the same level as a second- or third-generation relative, hearing the remarks and stories in the video really helped me develop an understanding of the type of people my great-grandparents were.”
- “The part of the video that inspired me most was hearing the testimonials of those who benefitted from the generosity of the foundation.”

Finally, the community benefitted from the project. Three nonprofits were featured in the video, their stories were woven into the long and short documentaries, and their stories were separated into three smaller segments that the nonprofits could use in their own communications. The head of a neighborhood community center featured in the video later commented,

It was exciting to share the center’s work accomplished through Knott Foundation’s longtime support and partnership. Through the video, we gained more visibility and credibility as a small community nonprofit that is growing. It aided us in receiving more support and recognition for our successes!

A representative from a local Catholic school reflected on participation in the video:

We were able to show potential and current funders the value of our organization and the positive impact we are making in the lives of our students. We value the history of the Knott Foundation, whose values and mission mirrors ours; having the video afforded us added credibility and spotlighted our symbiotic relationship.

Clearly, these stories from nonprofits featured in the video were meaningful to both the family and the community, and helped inform and inspire multiple stakeholders about the impact of each organization as well as the foundation’s giving.

Meanwhile, the presence of the video on the foundation website’s homepage has led to a richer understanding of the Knott Foundation’s legacy among grant applicants. The foundation’s grants manager recently commented that since

the enhancement of the video was added to the website, “many of the LOI’s [letters of intent] we receive do a better job of linking the mission, vision and values of Mr. and Mrs. Knott in a more realistic and thoughtful fashion.”

Practical Suggestions for Other Grantmakers

Video storytelling affords a multitude of benefits to foundations wishing to share their vision, values, and sense of community with key stakeholders. Here are some practical suggestions for maximizing the impact of a donor legacy video (Brodsky, 2017; Medinger, 2017):

1. **Build excitement on your board.** A legacy video project provides an opportunity for an entire board to get involved as a group. In this planning phase, working together to establish a vision, set goals, and consider the possible angles builds excitement for the project. Is the aim to create a centerpiece for a milestone family event? To explain the founders’ vision to potential grantees? To share grantee stories? Choose the desired outcomes for the video: Is it to encourage new members to join the board, or to clarify donor intent? Each board member — and, potentially, each family member — might make a list of things they have always wanted to know about elder or deceased family members. The more everyone is involved in discussions and decisions, the greater the participation and enthusiasm for the project.
2. **Tell a story, but not necessarily the whole story.** When family foundations start to think about telling a story, especially a family story, it can feel overwhelming. Where do you begin? How much do you tell? How much do you share when not every story is a positive one? Keep in mind that the purpose of a legacy video is not to recount every detail. Print is wonderful for sharing dates, facts, and figures; a website might be a great place for a timeline. Video shines in sharing emotions and feelings that will have a lasting impact — elements that cannot be

Stories need not be told only one way or by one person; multiple angles and a variety of perspectives will make a story that much richer.

conveyed on a static page. Video is all about sharing stories about evolution, identifying the turning points for the main “characters” in the story that led to decisions that created change and, ultimately, success. Sometimes those stories will be encouraging and joyful; other times they may be dark and depressing. The key is to include what feels both comfortable to the family and relevant to the story. It is in those emotional stories that wisdom and insight are gained.

3. **Focus on the elements of what makes a good story.** Just as we learned in middle school English, you need a few specific elements to ensure a great story: one or more strong characters, an obstacle or series of challenges, a climax or turning point, and a resolution or transformation. In a family foundation, there are already strong characters — people who not only challenged themselves to build great wealth, but who also decided to give back to the community. Think of first-generation family members as potential main characters, list the obstacles they faced, and then find the turning points that resulted in their success. Hearing about challenges that led to something bigger or better, either firsthand or from someone who knew them well, helps to bring out what a family truly values and allows future generations to gain life lessons and wisdom from those stories of triumph.
4. **Know whom to talk to and what they will add to the story.** Even if all the stories and main characters are not directly accessible, there are many other ways to proceed. Maybe the founders are no longer living

[T]he simple act of being interviewed can make subjects feel that they have been heard and that their stories matter.

but the eldest children know their stories well. If the founders created a large business from the ground up, perhaps a longtime employee can offer perspective on how the boss was a leader in their industry. Maybe a friend who knew the founder for years could share personal reflections and anecdotes. In a discussion of a foundation's evolution, younger board members can share their insights. Stories need not be told only one way or by one person; multiple angles and a variety of perspectives will make a story that much richer.

5. **Take time to plan and get the right team on board.** There are three phases of video production; if done well, the most important phase is pre-production. It is not enough to simply know what stories to tell and whom to interview. The right team must be on board to help guide the process — typically, a video production company that understands how to interview family members and navigate complex and sometimes painful stories. The producers conducting the interviews will need time for research and to potentially talk to interviewees ahead of taping, so they are confident they have crafted specific questions to ensure the stories are told well. The company will typically share an outline of its process — also called a “film treatment” — so everyone is on the same page prior to taping. The most successful projects are those that spend this critical time planning in pre-production.
6. **Budget enough time and money to do it right.** A quality legacy video requires time and money. Scheduling interviews and location shooting takes time. Taping might take just a day if there are only a

few interviewees and visuals are largely drawn from archival images. But multiple interviews in various locations or plans to capture scenic footage or action shots of the board or a grantee will require multiple days of taping and even more time for editing. Identifying family photos or gathering archival images also takes significant time and may add to costs. Be realistic about the budget, how much can be accomplished within that budget, and the deadline for the project.

7. **Understand that the benefits of interviewing go both ways.** It can seem that interviewing someone on camera or listening to his or her story on a finished video is of benefit only to the viewer, who is the receiver of the shared wisdom. But much research has shown that interviewees themselves often benefit as well. Dr. Karl Pillemer, a gerontologist at Cornell University, has said that “narrating life stories can help older people resolve internal conflicts, overcome self-criticism, and improve their sense of self-worth” (Gonzalez, 2015, para. 3). In other words, the simple act of being interviewed can make subjects feel that they have been heard and that their stories matter. The interviewee feels validated and at peace — a benefit that cannot be measured (Garland, 2016; Mager & Stevens, 2015).
8. **Film once, then use the footage five times.** During the planning period, consider all the places the video can be used and schedule the editing accordingly to get the most value for the money. For the Knott Foundation, this meant creating five separate videos from one project. The initial video, an extended documentary, was shown at a foundation event and is now an integral part of educating new trustees about their family history. But in the planning phase it became clear that it would be helpful for potential grantees who visit Knott's website to have an easy way to learn about the foundation, so a six-minute version of the documentary was created to post on the homepage. The full documentary

featured three nonprofit grantees to show the type of work the foundation supports and the impact it makes; these three mini-stories were edited in a way that made it easy to extract them from the longer video and share them, so each of the grantees could post their video story on their own website — one video used five ways. (It could even be taken a step further, creating 30-second videos from the main project to be used on social media. The possibilities are endless.)

9. **Create a shared experience to engage old and young alike.** Through the use of cellphones and social media, we are more connected today than ever — but we are connecting in a way that is also separate and apart. We are not as often communicating face-to-face or enjoying shared experiences. Research shows that these shared experiences are “an opportunity to understand and connect with the world” and that “watching more documentaries is important, but talking about them together in person is equally important” (One, 2016, para. 3). This is one reason why Broadway shows remain so popular, why people are willing to spend hundreds of dollars to see a favorite music artist in live performance, or why we still go to the movie theater instead of watching films only at home on Netflix. A documentary about a family foundation creates a reason to bring people together in one place and the opportunity for discussion to happen afterward. These conversations can inspire closeness and lead to positive change.
10. **Start today.** The concept of a legacy video is easy to get excited about, but getting started can be more challenging. Not knowing where to begin or feeling overwhelmed at the task can lead a family foundation to put off such a project. But each day that passes is another chance that a story will be lost. We recommend taking small steps each day toward getting it done. Create a deadline for a finished product, maybe around a milestone birthday or foundation

The concept of a legacy video is easy to get excited about, but getting started can be more challenging.

anniversary, and work backward from there. Start a brainstorming conversation with board members about the stories that need to be told. Find a production company with experience in family legacy videos and allow them to help get things moving. Incremental, day-to-day progress will not only help build momentum around the project, it will also ultimately result in a well-thought-out product.

Conclusion

A video storytelling project can be an important avenue for a foundation to share its mission while also preserving the history and values of the organization. It can become an important learning tool for trustees, grantees, and other stakeholders to better understand the historical roots and present-day impact of a foundation. Moreover, by illustrating the donor intent and motivational values of the founders, it can inspire future generations to identify with the philanthropic mission and story of the foundation — and ultimately, as in the case of the Knott Foundation, volunteer their time and talent to participate in the foundation in a meaningful way.

A documentary video can become a significant piece in a family’s narrative, contributing to the resilience and unity of generations to come. It can inspire, inform, and improve multigenerational engagement on an ongoing basis. In the words of one Knott trustee, “the video made the argument for me that being a member of the Knott Foundation is a legacy worth living.”

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