Morgan Stanley

Dominic Cellitti Senior Portfolio Manager First Vice President Wealth Advisor Wealth Management 1330 Post Oak Blvd Suite 900 Houston, TX 77056

tel 713-968-3034 fax 713.968.3200

Family Volunteering



"The test of our progress is not whether we add more to the abundance of those who have too much; it is whether we provide enough for those who have too little."

- Franklin D. Roosevelt

Volunteering Basics

It is easy to watch TV or play a video game with your children; but have you thought of volunteering with them? can Volunteering strengthen family's bond and benefit those who need assistance. Through volunteering, your children will learn to better appreciate all they have in their lives. All of us live in a materialistic world where our focus is getting more "stuff" and more "things." Volunteering teaches your children to turn their attention outside of themselves and focus on others.



Families with younger children should volunteer together to benefit various charitable causes. Children should start their philanthropic journey by volunteering at a young age, perhaps as young as four or five years old. Obviously at this age, the volunteering opportunities will directly involve you, as the parent, but your child will still benefit from the experience.

When your family volunteers, you and your children can create new memories together. By volunteering as a team, your family will enjoy shared values and experiences, which can create family traditions that strengthen your bond. Volunteering can enhance your children's self-esteem by allowing them to learn new skills outside of their normal home or school activities. Your children will meet new people from varied socio-economic backgrounds. Through interaction with people who are different from them, they expand their worldview. They can understand how they are similar, yet at the same time how they differ. Your child will learn that material wealth does not equal wealth of soul and spirit. Since volunteering is traditionally a group effort, it creates social interaction that teaches your children teamwork and leadership skills. Because of these new experiences, children have the opportunity to build their self-confidence. Yay for that! And most importantly, your children should derive satisfaction from learning a skill, and then using it to help another person. If your children are like most of us, they-want to help others and practice their new skills.

Since each child has unique attitudes and personalities, a parent should listen closely to those passions that interest his child. You can develop an awareness of causes, such as the environment, education, homelessness, animals, and health, through directed conversations. Once your child expresses an interest in a particular cause, you can take the cue from your child's enthusiasm. Then you can tailor the child's philanthropic focus toward the cause that excites him. Projects will be easier to plan and accomplish when your child is interested. Many of these projects can become lifelong opportunities for philanthropic volunteering. Oftentimes, an early introduction to volunteering can lead a child toward a vocational or career choice. An act as simple as shelving books at the library one day a week could prime the child's interest in becoming a librarian. And, just as importantly, the child can discover what he doesn't want to do. A short volunteering opportunity could help a child define his preferences.

A family that has a desire to volunteer can spend time researching potential charities before committing to one. Oftentimes, volunteering opportunities vary as much as the various charities. Some opportunities are very short-term, such as passing water out to runners at a marathon, while some are long-term, such as reading weekly to residents at a local nursing home. Parents should help their child choose activities that interest him or her, and that fit comfortably into his or her schedule. In all ways, the activities should be performed out of love.



If a family wants to volunteer together, many schools, community service organizations, religious organizations, or charities have an abundance of volunteering opportunities where a family can collectively volunteer. If your family cannot find a charity in need, consider creating your own customized volunteer opportunities.

The first and most important step of the volunteering process is for the entire family to collectively agree they have the desire and motivation to volunteer. Each and every family member should want to be engaged in all aspects of the volunteering process. If a member of your family does not have the desire to volunteer, you as a parent need to motivate for change. Having an open and candid conversation to uncover the reason for this lack of desire is critical. Only when you understand the "why" of his or her decision can you work for a "buy in" to volunteer with the rest of the family. For this reason, your family will need to hold a family meeting to determine if everyone is willing to work hard to help others. During this meeting the family should determine how much time each member will have to volunteer and what time or times each week or month are optimal for volunteering. For families that do not have an idea of how they want to volunteer, I suggest visiting the website www.volunteermatch.org. Once you type in "what you care about" and your location, a list populates with current volunteer opportunities based on your location and interests. When I visited the site, I typed in Phoenix, Arizona, as my location. There were twenty-two volunteer opportunities for children, one hundred twenty-two volunteer opportunities for teens, and one hundred sixteen volunteer opportunities for groups. Each volunteer opportunity lists the skills that are needed for the project, and the type of individual that is a good match, along with the requirements and commitments required.



Ask Yourself

Does your family volunteer?

Where in your community could your family volunteer?

If time and opportunity exists, your family should participate in long-term volunteering activities that have consistency. By continuously volunteering for the same activity, your family can easily measure their achievements and discover how it helps benefit the charity. Further, your children will become more comfortable with the surroundings, including knowing other volunteers. A systematic approach is important, such as volunteering the same days each month or week, or even volunteering the same number of hours. To avoid monotony or boredom, your children can ask to be assigned different tasks once they feel they have mastered their current tasks. For a young person, learning to run the register at a church thrift store could translate into a job skill for working in a grocery store or restaurant.

In order for you to be beneficial to any charity, your family needs to determine what skills and talents they have to offer the charity. For instance, if your family loves the outdoors and spends a lot of time camping, or trail hiking, you may want to consider working with an outdoor-oriented charity like the Boy Scouts or Girl Scouts, or

volunteering at a local summer camp for children.

Your family will need to consider the personalities of each person. For instance, if your family has a hyperactive child, volunteering for a repetitive indoor task, perhaps at a library is out of the question. Rather, an engagement outdoors, or one that is dynamic, would be more appropriate.



Ask Yourself

What skills do we have that will work for volunteering?

What skills does your child have that will work for volunteering?

Could your entire family work together on a project?

It is crucial that your family determines what they want to accomplish through their volunteering efforts. Families that volunteer generally will want to learn something from their volunteer experiences. In addition to teaching children the value of helping others through volunteering, there is probably something else your family desires. For instance, your family may want to expose your children to less fortunate children in order for your children to appreciate all that they have in their family. Or your family may want to volunteer in an area outside the local community. Through volunteering outside of your community, your family will learn first-hand how people dissimilar to your family, friends, and neighbors live. Learning about other types of cultures, communities, and economic classes allows your family to better relate, empathize, and assist those who are most in need.

It is important your family finds volunteering opportunities with charities that have a mission that matches your interests and goals. Unless the volunteer experience has a direct match to common interests and goals, it is doubtful it will be beneficial to either the charity or your family. For instance, if your family has a desire to help the homeless population in your city, you should focus your efforts on organizations that provide assistance to these people. You can first create a list of the various local charities that help the homeless, then find the opportunity that most directly fits your interest and family goal.

Next, your family should evaluate the charity's programs to understand their mission and goals. Most families prefer to focus their volunteering efforts on those charities that are adhering to their mission, meeting their goals, and are fiscally fit. A good place to start in evaluating a charity is Charity Navigator. This website does an excellent job of fully evaluating charities. Note: Charity Navigator is further discussed in the fourteenth chapter of this book.



Ask Yourself

Do the charities your family support have success in meeting their stated goals?

Are they financially fit?

Once your family has determined what organization or organizations you are considering assisting, you should then determine if the skill set of your family members matches with the stated needs of the charity. For instance, if a charity states that they need help with making and distributing meals to the homeless, your family should be able to cook and deliver the meals. By contacting the charities via phone, or reviewing their websites online, you can discover the charity's specific volunteer needs. Most charities will require volunteers to attend training workshops, go through various interviews, or complete a number of forms prior to volunteering for the first time.

When your family finds the right charity that fits their skill set and

level of commitment, it is crucial you make the commitment to consistently help the organization. Your family will need to realistically determine how much time and effort they can give and when the whole family will be able to jointly help. Honoring your commitment is crucial to teaching children the importance of helping others. Even when a conflict arises, you and your family will need to adhere to the volunteering agreement. Not every time



will every member of your family be able to collectively work together, but for the majority of the time, this should be the case. If for any reason the family is not certain sure they can fulfill their agreement to volunteer, they should cease the volunteering efforts.

During the volunteering experience, it's best if your family works as a team. Under no circumstances should you as the parent just "drop off" your children to volunteer, and then pick them up later. The activity should not consist of you or your children just standing around watching the other members work. Whenever possible, the family should volunteer within close proximity of each other while at the charity. This in itself will create the family



bonding opportunity.

After your family has finished their first or second volunteer experience, you should arrange a family meeting. This meeting will give each family member the opportunity to express their thoughts and feelings regarding the volunteering experience.

Each family member should vocalize to the others the following:

- Who did I help?
- How did I help them?
- What skills did I use during the volunteering experience?
- What did I like about the volunteering experience?
- Did the volunteer experience give me a sense of accomplishment or pride?

- Was there anything negative about the experience? How could it have been changed?
- Do I have the desire to continue volunteering for this cause?

Perhaps the first volunteer project your family chooses may not be a good fit. Regardless, you and your family will learn what they do and do not like through trial and error. Moving from project to project is not a mistake, as long as an optimal fit is eventually found. If each family member sees the value of the volunteer experience and derives self-gratification, chances are the volunteering experience will be a success.

Families who volunteer should share with other families and friends the details of why they are volunteering along with the success they are feeling about helping others. Remember, your family's volunteering could motivate other families to begin volunteering at a charity of their choice. Make sure that if you do let others know of your volunteering, that it is not boastful.

Family volunteering will produce children who are more likely to pursue individual volunteering programs as they become young adults. The skills children develop through group volunteering enhances the likelihood of them becoming philanthropic leaders as adults. Through interviews with the

various junior philanthropists—many of whom are now adults—and their parents, I discovered participation in volunteering as a child continued into their adulthood. In fact, some of the junior philanthropists are now philanthropic leaders in their college through their fraternities, sororities, or clubs. Further, some of these children even pursued a philanthropic career or a job focused on helping others because of their childhood volunteering experiences. What you teach your child matters! They carry it with them.



Excuses for Not Volunteering!

Many families have good intentions to volunteer but list excuses instead of actions.

Below are listed seven common excuses and reasons to overcome these objections.

1. Our family does not have the time.



The reality is everyone makes time for things they enjoy. Yes, it is true that most families have many obligations and activities, but finding the time to help others is an important bonding opportunity. If you or other members of your family can find time to watch TV, surf the Internet, or play video games, then you have the time to spend a few hours each month volunteering.

2. My children do not seem interested in volunteering.

Although your child should not be forced to volunteer, most children become enthusiastic about volunteering once an appropriately interesting activity is presented to them. Including your child in the decision-making process of choosing the specific activity is important. You should engage your child first to determine how they want to help others.

3. My children are too young to volunteer and/or they are different ages.

The older the child, the more opportunities exist, but there are plenty of activities where younger children can volunteer. If the entire family volunteers together, each family member will assume different roles appropriate to their skill set and age.

4. Nobody is ever available at the same time to volunteer.

Make it a priority to find an early weekend morning or a Sunday night once or twice a month when everyone can volunteer. Although this is not recommended, if your family is large, you may have to break off into a few different groups with a different volunteering focus. If your family can find the time to attend a sports activity, concert, or a dinner out together, they can find a few hours each week or month to volunteer

5. We volunteered in the past but it was not successful.

As with all activities, not every situation is a good fit. It's important to reflect upon the reasons the experience was unsuccessful. Could one or more of the situation's criteria change to make the experience positive?

Just because you try something once does not mean it will have the same outcome the second time. Time should be spent to determine an activity that all family members agree is worthwhile, interesting and desirable.

I do not want to expose my children to awkward or frightening volunteer situations, such as homeless shelters and pediatric hospital wards.re are activities where your children could be exposed to a situation that might make them uncomfortable. It is the parent's responsibility to understand that and choose activities that are appropriate for their children.

6. We do enough already, and we are always writing checks and giving cash to a variety of causes.

Although a parent may give money to help various causes, more than likely the child does not. Philanthropy is more than just writing a check. By bonding together as a family to help a common cause, a child will learn the importance of teamwork and how to help others in need.

Rather than let these excuses get in your way, look for opportunities to widen your philanthropic vision with your family. Small adjustments in your scheduling, time allotment, and skill-building sets will improve your volunteering experience.



Ask Yourself!

What small adjustment could your family make in their schedule to allow for volunteering?

What skills could you improve to enhance your volunteering experience?

Volunteering Resources

Below you will find fifteen categories of volunteering. Review the list to determine what types of volunteering opportunities appeal the most to your family. Once you can narrow your focus to a few areas, the next step is to research and find those opportunities in your community.

In today's age of the Internet, many people find volunteer ideas online. Further, volunteers often visit various charities' websites to learn more about the charity before volunteering or donating money. In order to determine what type of charitable areas you want to benefit, review the fifteen categories listed below.



Categories:

- Working with People; such as children, family, elderly
- Working with the Environment; such as litter control, recycling, wilderness, conservation
- Working with Poverty; such as the homeless, poor, or hungry
- Working with Sports and Recreation; such as local sports, community activities
- Working with the Needy; such as special needs, disabled, sick
- Working in your Local Community; such as gardens, arts, neighborhood
- Working with Education; such as literacy, schools, after-school tutoring

- Working with Health; such as sickness, mental issues, research
- Working with Social Activity; such as voting, human rights, political issues, community reform
- Working with Police and Emergency Services
- Working with Animals; such as shelter and protection, animal rights
- Working for Public and Social Justice; such as citizen rights, community reform
- Working with Art and Culture; such as theater, ballet, music
- Working with Faith and Religion; such as churches, synagogues and mosques, and its related activities
- Working with International Affairs



Ask Yourself

Which of these categories interest me the most?

Which categories might be best for your family's volunteering?

Volunteering Opportunities

There are many sources for volunteering ideas. Here is a short list of fifty volunteering ideas. It is recommended that you attempt to follow your heart by finding your own cause(s) that is significant to your family. For instance, if the family has a close relative who has cancer, supporting various causes that will attempt to defeat cancer may be a good and passionate fit for your family.

Some of these ideas require a short-term engagement while others will be ongoing commitments. There will be some volunteer efforts that are familyoriented, youth-oriented, or both. Further, some ideas may be best for older children, some for younger children, while some can support both. Next to each of the fifty ideas, are letters which correspond to the descriptions listed below:

O: Ongoing volunteering

S: Short-Term volunteering

Y: Best suited for Younger children

A: Best suited for older children or Adults

F: Best suited for a Family volunteer experience

I: Best suited for an Individual volunteer experience

<u>Religious Institution</u>: (OSYAFI) Contact a representative from your religious institution to learn how you can volunteer to either benefit it or work with other members on causes supported by the religious institution.

<u>Casual for a Cause</u>: (SYAI) Ask your local school if they would be willing to let students dress casually for a charity. Those who dress casually will pay money which can then be donated to a charity.

<u>Angel Tree</u>: (SYAF) During the holidays, find locations in your community that have Christmas trees with children's names and holiday gift ideas. Consider taking a name from the tree and buying gifts to give that child.

<u>Car Wash for Charity</u>: (SAF) Organize friends and family to wash cars. Use the proceeds to donate to the charity of your choice.

<u>Balls for Dogs:</u> (SYFI) Ask local schools, recreational parks, and tennis players if they will donate their old tennis balls. Organize the balls, and then donate them to an animal shelter in your community.

<u>Dog Walking</u>: (OAI) Walk dogs for your local animal shelter or for people in your community, who because of a physical condition, cannot walk their own dogs. If funds are raised, donate to your local animal shelter.

Art for Children: (SAF) Organize a group to create custom art. After the artwork is completed, visit the local hospital to give them to the sick children. Alternatively, you can sell the art, then donate the proceeds to a children's charity.

Bake Sale: (SAF) Ask friends and family to bake various sweet treats. These

treats can then be sold in your community, at a sports event, or at school. Use the proceeds to donate to the charity of your choice.

<u>Plant a Tree: (SAI)</u> Help the environment by planting one tree or multiple trees in your community. Consider planting your tree on National Arbor Day. Go to www.arborday.org for additional



information.

<u>Holiday Gift Bags for Underserved Children</u>: (SYAF) Find a local organization that helps children, and then organize a group of friends and family to fill gift bags to be given to these children.

<u>Senior Tech Consultant</u>: (OSAI) Volunteer at your local retirement center or neighborhood senior center to help seniors learn about technology (phones, computers, etc.).

<u>Habitat for Humanity:</u> (SAFI) Volunteer to raise funds for a habitat or assist in the building of houses for qualified families. Go to <u>www.habitat.org</u> for more information.

<u>UNICEF</u>: (SAF) Volunteer or host an event for UNICEF, which helps disadvantaged children throughout the world. Go to <u>www.unicef.org</u> for more information.

Neighborhood Block Party: (SYAF) Organize and host a block party for your neighborhood to raise awareness and money for the local charity of your choice.

<u>Dog Wash</u>: (SYFI) Ask people with dogs if you can bathe their dogs in exchange for a charitable donation.

<u>Garage Sale</u>: (SYAF) Organize a garage sale with your friends and neighbors. Use the proceeds from the sale to benefit a charity of your choice.

<u>Toys for Tots</u>: (SYFI) Donate your gently used toys or purchase toys for organizations that host toy drives during the holidays. Go to <u>www.toysfortots.org</u> for more information.

<u>Balls and Gloves</u>: (SYAF) Find an organization in your community that is in need of used sports equipment, and then organize a group to collect sports balls and equipment.

<u>School Backpacks</u>: (SAF) Organize a school backpack project for students in your community. You could buy the backpack and supplies, assemble, and deliver them to a local school or church.

<u>Meals on Wheels</u>: (OYAF) You can volunteer to deliver meals to seniors in your community. Go to www.mowaa.org for details.

<u>Book Drive</u>: (SYAI) Collect used children's books, and then donate them to hospitals, schools, or daycare centers.

<u>Food Banks</u>: (OAFI) Volunteer at a food bank to organize, cook, and package food for homeless or needy people.

<u>Winter Coats</u>: (SYAI) Collect winter clothing items to donate to shelters, organizations, or people in need.

<u>Assist the Elderly</u>: (SYAI) Volunteer to help an elderly friend, neighbor, or relative with errands, yard work, or cleaning. If they want to pay you, use the proceeds to donate to a needy senior.

<u>Nursing Home Volunteering</u>: (OAI) You could create fun and exciting events for the residents or visit those who desire friends. Ask your local nursing home how you can help.

<u>Pediatric Hospital Ward:</u> (OYAFI) Determine if your local hospital needs assistance. You can help the children by reading, playing a game, or just having conversation.

<u>Hospital Volunteer</u>: (OAI) Contact your local hospital to determine their needs. Since most hospitals relay on many volunteers, they are sure to need volunteers.

<u>Special Olympics:</u> (SAFI) Determine when the next Special Olympics will take place in your community. Contact the organization to learn how your family can help.

Boys and Girls Club: (OAI) Find your local club to see how you can join or mentor the children at the club.

<u>Foster Family for Pets:</u> (OYAF) Locate your local animal shelter or rescue group, and then inquire how you can serve as a foster home for a pet in need of a permanent home.

<u>Parks and Recreation:</u> (SOYAI) Volunteer at your local parks or recreation department. You could help with landscaping, beautification, or cleanup.

<u>Big Brothers</u>: (OAI) Consider being a big brother to a child in need of a parental figure. Go to <u>www.bbbsba.org</u> to learn more about your local chapter.

<u>Support the Troops</u>: (OYSAF) Put together a package of goods to show our soldiers abroad how much we care. Go to <u>www.supportourtroops.org</u> for volunteering ideas.

Adopt A Highway Program: (SAF) Contact your state's department of transportation to volunteer to remove litter, beautify landscape, or care for wildlife.

<u>Food Banks</u>: (OSYAFI) Sort, unload, organize, and prepare food for a local food bank. Go to www.feedingamerica.org to find local engagements.

<u>United Way</u>: (OSYAFI) Research online or call United Way to find ways you can help improve the lives of those in need. Go to <u>www.unitedway.org</u> for more information.

<u>Tutor Children:</u> (OSAI) Use your knowledge of a particular subject to help children learn about a topic or skill, by volunteering at a children's organization or school.

<u>Coaching</u>: (OAI) Volunteer at your school, sporting club, or organization to help with youth sports.

<u>Reading is Fundamental</u>: (OAI) Help with children's literacy by volunteering to develop the love of reading and learning for local youths. Go to <u>www.rif.org</u> for more details.

<u>Library Aid</u>: (OAI) Inquire at your local library about volunteer opportunities. You can assist patrons in their quest for books and information. If you have extensive knowledge of computers, you could even serve as a tutor.

<u>Theater and Museums:</u> (OYAFI) If your family has an interest in the arts, there are a variety of ways to help. Whether it is taking tickets, giving tours, or promoting shows, your family can help.

<u>Children's Museum</u>: (OYAF) Help the children's museum in your community. Go to www.childrensmuseums.org for more information.

<u>Voting:</u> (OAI) Join the local league of women voters to help make democracy work by engaging voters, protecting voters, and defending or reforming causes that matter. Go to <u>www.lwv.org</u>

<u>Political Candidates</u>: (OAFI) Volunteer to help the election or re-election campaign of a local, state, or national level political candidate.

<u>Foreign Exchange Student</u>: (OAF) Open up your home by hosting a student from another area of the world, and allowing them to live with your family for a semester.

<u>Pen Pals</u>: (OYAI) Consider becoming an e-mail pen pal with an individual in need. There are a variety of websites dedicated to finding people in need of a new friend.

<u>Babysit for A Cause</u>: (OSAI) Donate some or all of the money you raise through your babysitting or pet sitting effort to a particular charity.

<u>Human Rights</u>: (OAI) Support the equal treatment of all people by volunteering for organizations such as Amnesty International. Go to <u>www.amnesty.org</u> to learn more.

<u>Community Garden</u>: (OYAFI) If you live in a rural area or city, organize and tend to a community vegetable garden to either help local residents or a homeless shelter. Go to www.communitygarden.org for more details.

<u>Stand Up To Cancer</u>: (SAF) Host an event or volunteer your time to help fight various types of cancers. Go to <u>www.Standup2cancer.org</u> for more information.

Adopt a Soldier Program: (SYAI) Help a soldier through participation in this program that connects civilians with troops, to offer encouragement through communication. www.adoptaussoldier.com



Ask Yourself

Which of the fifty ideas do you think are most suitable for your child?

How will you discuss these top ideas with your child in order to motivate him to participate in one or more volunteer ideas?





Call to Action Chapter 9: Family Volunteering

Matching Skills with Volunteering Worksheet	
Today's Date	
Does your family volunteer?	
Where or how does your family volunteer?	
Which family members are involved?	
What skills are being used?	
How often do you volunteer?	
Teaching Children	
Why do you volunteer? As a family?	
Ask your child if they have been in a class or activity where someone volunteered her time.	

Did your child know the person was volunteering?	
How did the child feel about the value of the person's volunteering effort?	
If the volunteer was not at the activity, would the activity run smoothly, be as much fun, or help as many people?	
Would your child like to volunteer?	
Further Actions	

Further Actions	
Ask your child where he would like to volunteer?	
What would your child like to do?	
What skills are necessary?	
Is this an activity the family can do together? Will it be a child- or adult-driven activity?	

Morgan Stanley Smith Barney LLC. Member SIPC. The views expressed herein are those of the author and do not necessarily reflect the views of Morgan Stanley Wealth Management or its affiliates. All opinions are subject to change without notice. Neither the information provided nor any opinion expressed constitutes a solicitation for the purchase or sale of any security. Past performance is no guarantee of future results.

Please note that by clicking on this URL or hyperlink you will leave a Morgan Stanley Smith Barney LLC website and enter another website created, operated and maintained by a different entity. Morgan Stanley Smith Barney LLC is not implying an affiliation, sponsorship, endorsement with/of the third party or that any monitoring is being done by Morgan Stanley of any information contained within the linked site; nor do we guarantee its accuracy or completeness. Morgan Stanley is not responsible for the information contained on the third party web site or the use of or inability to use such site.

Morgan Stanley Smith Barney LLC ("Morgan Stanley"), its affiliates and Morgan Stanley Financial Advisors and Private Wealth Advisors do not provide tax or legal advice. Clients should consult their tax advisor for matters involving taxation and tax planning and their attorney for matters involving trust and estate planning, charitable giving, philanthropic planning and other legal matters.

CRC # 4527353 **05/25**

Dominic Cellitti Senior Portfolio Manager First Vice President Wealth Advisor

1330 Post Oak Blvd Suite 900 Houston, TX 77056 (713)-968-3034