

## Philanthropic Conversation Questions

### I. Understanding a Family's Background and Values:

1. Describe two or three events during your younger years that most impacted your view of life?
2. What people helped shape your values and most influenced who you are today?
3. Have your perceptions of your parents changed since you were a child? How?
4. During childhood, most of us learned about money either through the teaching or example of our parents. Which of these money lessons from your parents have carried over into your adult years, specifically related to giving?
5. As you think about past gifts can you tell us about a gift or two that made you proud, and maybe a few others that fell short of donor intent?

### II. Strategic philanthropy

1. Do you have a vision of your giving and what it can achieve?
2. There are three things you can do with your wealth when you are gone: give it to the government, leave it to your heirs, or give it to charitable endeavors. If taxes were not an issue, how would you apportion your wealth?
3. Do you want your family members, friends, or future generations to continue your giving legacy? In what ways?

### III. Grant making policy

1. How do grant opportunities come to the foundation's attention?
2. Some say the decision to give is like a purchase decision. There are hundreds of nonprofits in most communities. What determines your decision to give?
3. What do you look for in a grantee organization?
4. Do most grants go to the grantee organization to be used "where needed" or to a specific purpose, e.g., a worthy program, capacity building, or capital campaign, etc..
5. How do you judge the impact of the foundation's gifts?
6. Are you comfortable limiting philanthropic involvement to writing checks, or does it want to be more proactive and involved, i.e. provide strategic advice or introductions, convene meetings of all stakeholders around a particular issue, volunteer, etc.? What about for other family members?

#### IV. Governance

1. Do you have a giving mission statement, either in mind or on paper? If not, would you consider developing such a statement as part of your planning process?
2. How are giving decisions made? What is the role of your family, and if you have not included them why not?
3. What are you doing well in your giving process? What could you improve?