

Sample Philanthropic Conversation Questions

- Mark Percy



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. What kind of person do you want to be in what kind of world?
4. What do you value most? What would you hate to lose and why?
5. What might you achieve beyond making and having money? Beyond wealth what do you want to leave my children and grandchildren?
6. Who or what has been significant in forming your ideas about wealth?
7. What are the illusions you had about life? What mysteries are you still trying to figure out?

II. Strategic Philanthropy

1. Do you have a vision of your giving and what it can achieve?
2. 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?
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 gift opportunities come to your 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 gifts 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 your larger gifts?
6. Are you comfortable limiting philanthropic involvement to writing checks, or do you 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?