



Charitable Giving Questionnaire #2

1. Considering our history as a family, do we understand and agree on our core family values?

How would you express them?

2. Do your values differ from those in your family? If so, how would you express that difference?

3. The family is fortunate to have significant resources that can be used to enable its members to further important personal business and philanthropic interests. What is your view of these resources, and what opportunities, risks, and issues do they represent to you?

4. Does a family foundation seem like a good idea? If so, why? If not, why not?

How do you think a family foundation should be organized?

5. Individually, we have a history of charitable giving and volunteerism. Do we know why we made those gifts of money and time? Do we feel good about our choices? Do we know if our efforts made any difference?

- a. Which of our past gifts have given us the most satisfaction?

- b. Which of our past gifts have given us the most satisfaction?



6. As a donor, and perhaps as a trustee of a family foundation, what criteria would you put on proposals before they were funded?

7. Considering the future, what are the things about which you feel passionate? What are the things that really interest you? There are many major issues facing society, including the arts, children's causes, civil rights, education, environment, housing, health care and abolishing hunger. They are all important, but which ones would you give the highest priority? Which ones do you feel are most important and why?

8. To what extent would you like to be involved in the work of exploring and/or analyzing problems and shaping promising solutions?

9. To develop a process that works for each of us, what steps would be the most helpful for you to learn about the things that interest you?

Research on specific subjects _____
Site visits to nonprofit organizations _____
Background information to read _____
Visits with experts _____

10. How much direct contact with donees would you like to have?

11. Given your other commitments, how much time do you have to devote to philanthropy?



12. Based upon what you know about the family, do you think it is possible to arrive at a consensus around giving?

13. Irrespective of consensus, should resources be made available for each individual to give and to use as he or she wishes? If so, what amount could you effectively use in 2006?

14. What level of recognition and visibility interests you?

15. How much risk tolerance do you have? (That is, are these funds to be used as seed capital, or are you more interested in building organizational capacity within existing organizations?)

16. In which geographical range are you most interested in giving help: local, national, global, or some combination of all three?

17. Are you more interested in helping individuals or organizations, or do you wish to affect public policy?

18. Any other ideas or thoughts?
