

Combined Family Giving and Business Discussion Questions

Family Business Board (Green Marker)

1. Why don't you find the corp giving appealing?
2. Who has authority to decide?
3. Rebecca AND family... where's Dad in this?
4. Why groups were chosen?
5. More about business — values, history...
6. Individual family roles
7. What does 'meaningful' & 'strategic' mean to you?

Values & Communication (Red Marker)

8. Why do you give?
9. What are your top three values? (and you?)
10. What's already working with your giving?
11. What about current giving would you change?
12. How do family roles affect decision making?
13. How do you feel about how your family communicates / makes choices?

Meaning, Values & Engagement (Blue Marker)

14. What do you personally think led to your family being here?
15. What do you find meaningful about the giving your family is currently doing?
16. How does your family's giving reflect your own values — or not?
17. What concerns do you currently have about your family's giving?
18. How engaged do you want to be with your family's giving?
19. What else should we know that hasn't been asked yet?

Family Business & Philanthropy Overview (Blue Marker)

20. Can you tell me about your family business, philanthropy, and family business psychologist who referred you to us?
21. What are you trying to accomplish with your family corporate philanthropy?
22. What is working / not?
23. What compels you to give or inspires you?
24. What are the largest issues to solve?
25. How do you hope to work with your family?

Follow-Up Questions (Green Marker)

26. Tell me more about your engagement with the business psychologist.
27. How do you know your giving is meaningful?

Values, Role & Strategy (Green Marker)

28. What are you passionate about? (Individually)

- 29. What are your corporate philanthropic values?
- 30. What's your why?
- 31. What does strategic giving mean to you?
- 32. How would you describe your involvement or role?
- 33. How do you feel about the current giving plan?

Corporate Giving Program (Black Marker)

- 34. Tell me the history of your corporate giving program.
- 35. Why do you have a family business psychologist?
- 36. What can each of you say about your current grantees?
- 37. Who is the decision maker?
- 38. What does compelling giving look like?
- 39. Does everyone agree that the corporate giving needs to be reimaged?