

## Legacy Module 8. Founder Interview

*Simple approach to interviewing and documenting your donor's story and hopes for the future*

### **Purpose:**

To hear directly from the founder(s)

### **Outcomes:**

- Opportunity for the founders to share about their philanthropic journey
- Chance for other family members to ask questions, listen, and learn
- Formal or informal documentation of founder story and hopes for the future

### **Process:**

Fishbowl structure, group discussion

### **Materials:**

Questions list, two mechanisms for recording (phone and video, or two phones for back-up)

Recommendation: Meet in a comfortable living room space, not around a table.

Many families wish they had video or audio of their founders available to center their giving, to hearken back to, to share with future generations, etc. You can hire a documentary writer or filmmaker, certainly and some giving families have done so with great outcomes. But you can start much simpler, by having a family conversation and recording it.

### **Activity and Discussion:**

Set aside time to interview the donors or founders of your family giving enterprise. In advance of your interview session, determine who and how you'll record the discussion (audio and/or video) and be sure to have a second mechanism as back-up.

In advance of recording, create a list of interview questions. You can create your own, more personalized list, or build from the list below. Decide how you'll ask the questions—whether one person will serve as interviewer, or whether you'll take turns asking questions. We recommend the latter to engage everyone in the process.

Be sure to share this list with your interviewees in advance; some people need time to reflect and others are fine off-the-cuff, but give them the opportunity to prepare if they wish. And, approach the interview with empathy—this can be a daunting prospect for many donors, even just in discussion with their loving family.

#### Founder Questions – A Starting Point\*

- What are some of your earliest memories of giving, helping, or volunteering?
- What have been meaningful gifts you've received in your life, material or metaphorical?
- Why did you begin this foundation (or donor-advised fund, etc.)?
- What are your hopes for what giving as a family will accomplish for the world? For our family?
- What worries you about our family philanthropy?
- Are there specific organizations or general areas, topical or geographic, you want us to give to always? Approaches you want us to take? Or do you feel flexible?
- What are your hopes for the future of our family giving?
- What are some of the values that have guided and sustained you through life? Where did these values come from?
- What family stories or role models have instilled your values and worldview? What opportunities in your life were most crucial to your own success?
- What is an accomplishment you are deeply proud of in your career? In your roles and relationships within your family?
- What's been one of the most meaningful gifts you've ever received, whether advice or something material, and why?
- What's a grant or philanthropic gift you've made—or other philanthropic involvement—that you are particularly proud of or connected to, and why?
- What have you learned along the way as a donor? Any fumbles or foibles you'd like to share?
- What aspects of how you give have been meaningful to you, whether multi-year giving, named (or anonymous) gifts, building deep relationships with grantees, etc.?
- What's a change in the family giving that has already occurred that you would note as being healthy growth and development of your giving?

- Is your hope and intent that the foundation hews closely to your current vision and foci and giving approach, or that successive generations lead and give as they see fit given ever-shifting community needs and board passions?
  - ◊ Are there key grantees or geographic areas you'd like to ensure will always remain a part of the family's giving?
- What are your greatest hopes for the future of our family giving, whether around what we give to, how we give or work together, or if/how future generations are involved?
  - ◊ Can you imagine non-family members being involved?
- (If using a family foundation as vehicle) Why did you establish the foundation as a family philanthropy? Why not as an individual giving program—one where you wrote checks directly to nonprofits? Why not as a general bequest to your favorite organization(s)?
  - ◊ What does the “family” in family philanthropy mean to you?

After the interview, thank the donors for their candor and thoughtfulness, and be sure to save the documentation in multiple places and share it with the family.