NATIONAL CENTER FOR
FAMILY PHILANTHROPY

Family Giving Online Knowledge Center
Board Activities and Training Procedures

TITLE: **Questions For Prospective Consultants**

SOURCE: ***Voyage of Discovery: A Planning Workbook for Philanthropic Families***

QUESTIONS FOR PROSPECTIVE CONSULTANTS

1. Who are you?

- How long have you worked in the field of philanthropy?
- What philanthropic experience do you have in addition to consulting? (e.g., program development experience, nonprofit administration, trusteeship with other foundations, staff experience on foundations, etc.)
- What are your academic credentials? Your work experience? Additional formal learning experiences that would contribute to your work with us?
- What experiences have you had professionally that are not related to philanthropy?
- What do you do with your leisure time?

2. How would you work with us?

- What approach do you use when consulting in planning with family foundations or philanthropic families? What could we expect in working with you?
- What outcomes would you help us toward and what products would you deliver at the end of the process?
- What would you expect from us? From our board leadership? From board members participating in the process? From our staff?
- Would you be willing to provide us with a brief proposal, after we have described our situation and needs to you?

3. Will you provide interim reports?

4. What are the costs?

- What is your fee structure?
- Do you charge for travel time? (Some do, some don't, some charge half for travel time.)
- Given where you are based, and the extent of work that may be required, what are your projections of expenses? Are these included in the fee?

5. When are you available to work with us?

- Do you have some flexibility?
- If the task is extended — some planning projects are spread over many months — can you make the commitment to finish given your other commitments