



# Discussion Starters

## Questions for Reflection & Discussion

Articulating and refining your philanthropic legacy is an iterative process, with many points of reflection, inflection, and conversation. Here are some questions to help you review and understand each lever and discuss with others as you dive in.

## A Modern Framework: Legacy Levers



### LEVER 1: VALUES

- What are the three core values that drive your giving and why?
- How do these values align with—or differ from—the values of others involved in your giving, including past, present, and even future family members? Where is there the most powerful alignment in values?
- What is one philanthropic gift you've made, small or large, that most embodies this lever for you, and why?



## LEVER 2: INTENT

- What motivates you and your family to give?
- How does your founding donor's intent currently impact your work, whether that founding donor is you or a relative who is no longer alive?
- What core tenet, family story, or kernel of donor intent would you like to see carried through into the future of your family's philanthropy?
- What is one philanthropic gift you've made, small or large, that most embodies the concept of donor intent for you, and why?



## LEVER 3: PLACE

- What place or places do you feel most connected to in your giving, and why?
- Has this changed over the years, or do you imagine it changing in the future; is there agreement among members of your family on this question?
- What is one philanthropic gift you've made, small or large, that most embodies your pride of place, and why?



## LEVER 4: FAMILY

- What does the "family" in family philanthropy mean to you at this time?
- How does giving together impact your family, and how does giving as a family impact your giving?
- What is one philanthropic gift you've made, small or large, that most embodies family for you, and why?



## LEVER 5: ACTION

- How would you describe your family's current legacy in action—that is, what piece of how you do your giving feels most meaningful as a legacy lever?
- Which of the trends in action resonate most for you, and why?
  - ◇ Long-term, flexible support
  - ◇ Using privilege to share power and decision-making authority
  - ◇ Spending big, spending now
  - ◇ Building authentic relationships and trust
- What is one philanthropic gift you've made, small or large, that most embodies this lever for you, and why?

## LEGACY LEVERS: BIG PICTURE QUESTIONS

- Which levers feel instinctually most resonant and important to you right now?
  - ◊ Which levers challenge, confuse, or do not resonate with you?
  - ◊ What about for other members of your family?
  - ◊ Which levers can you imagine becoming increasingly important in the future?
- *Why* do you give? How does this align with the legacy you wish to create?
- *How* do you give? How does this align with the legacy you wish to create?

## UNDERSTANDING LEGACY: STORIES FROM FAMILIES IN CHANGING TIMES

- What speaks to you in the donor stories, and why?
- What story of your own would you like to share with others in your family?

## PRACTICAL MATTERS: STRATEGIES, TIPS, & TOOLS FOR FAMILY ENGAGEMENT IN LEGACY

- What ideas in this section do you want to take note of that might be helpful to you in your journey?

## NEXT STEPS

- Who in your family—or beyond—might you like to discuss your giving legacy with?
- What are one or two next steps you might take in refining your unique family giving legacy? Examples might include:
  - ◊ Engaging younger generations to interview older generations to learn about their life journeys, lessons learned, and hopes for your family's giving. And/or vice-versa—invite older family members to interview the youth—sure to be a powerful experience for all!
  - ◊ Gathering for a family retreat—even virtually—to explore shared values
  - ◊ Committing to spending a small but set amount of family meeting time each time you gather in the coming year around your philanthropy to explore one of the questions.
- Which of the above levers resonate most strongly for you and feel most important to your family's giving right now?
- If you could sum up your intended legacy today in three to five words, what would you say?