Worksheet 1: *Who is Involved?*

Use this worksheet to help you and/or your family think through who might participate in what role. You can complete the worksheet individually or use the questions to spark a discussion. Keep in mind: There are no right or wrong answers to these questions, yet there are implications for including—and not including—others in your philanthropy.

Family Members: Yes 🗌 No 🗌

If yes, which ones and how will we define "family?" (Direct bloodline? Spouses or partners? Siblings, nieces and nephews, cousins? Adopted children or stepchildren? Family of choice?)

Trusted Allies: Yes 🗌 No 🗌

e.g., maternal grandmother, a mentor or coach

Community Advisor(s): Yes No e.g., battling a disease; receiving financial assistance from others; observing extreme poverty

What roles might you want to fill and why?

e.g., board of directors, grantmaking or scholarship committee, paid consultant or contractor, staff, informal advisor

From the National Center for Family Philanthropy's <u>Governance Primer</u>

Worksheet 1: Who is Involved? — Continued

Participant	Envisioned Role(s)	Interest	Notes

Interest: Indicate each person's level of interest in being involved based on what you know today: Very Interested (VI), Interested (I), Tentative (T), or No Interest (NI), or Unknown (U).

Notes: What factors might limit their participation (e.g., time, not old enough yet, geography, career or family responsibilities)? What concerns might they have before they say yes?