

Worksheet 2: Structure of Roles

Now that you've thought through whom you'd like to involve in which roles in your philanthropy (Worksheet 1), you can put more structure to those roles. Consider the questions below for each group or role you wish to fill.

ROLE: _____
e.g., board of directors, grantmaking committee, or community advisory board

What primary responsibilities or decision-making authority will the group have?

What's the ideal number of people involved? Will the number of participants increase or decrease over time? Will the type of participant change over time (family, non-family)?

How long will members serve? What term limits or rotation policies can we establish to bring a fresh perspective and give other members a turn?

Will all participants have an equal voice? If yes, how will we ensure everyone's voice is heard? If no, who will serve as decision makers, and who won't? What other informal ways might members participate?

How often might the group need to meet? And how much work might there be in between meetings?

How will the group be evaluated? How will you define success or failure in its work?