Family Philanthropy Readiness – Self-Assessment Tool for Community Foundations
Online Survey Questions

The online survey has 30 multiple-choice questions, each with 3 or 5 answers. Participants pick the answer most closely fitting their view of their foundation.

Section I. Mission and Core Business Compatibility

1. If a donor interested in family philanthropy read our foundation's mission and/or vision statement, she would assume that…
2. Our CEO and board of directors would want the donor to assume…
3. Which sentence *best* describes your community foundation's *primary* purpose (even though you're likely doing work in all of them)?
4. Assuming the work is prudent from a cost-benefit and mission alignment standpoint, our foundation offers philanthropic services to these customers (individuals, families, private foundations, or other entities)…
5. Describe your donor advised fund policies.
6. Which statement best reflects your personal view on working with donors and their families?

Section II. Understanding Your Market

1. Describe your community's existing philanthropic wealth.
2. For this question, think of your larger funds and supporting organizations. Do the donors and their heirs generally live in your service area or are they geographically dispersed?
3. Describe your marketing program for private family foundations and/or family offices.
4. Describe the current demand from donors for family philanthropy services.
5. Describe the current demand from professional advisors for family philanthropy services.
6. What competition do you have in offering family philanthropy services?

Section III. Donor Stewardship and Philanthropic Services Capacity

1. How would you objectively grade the working relationships and flow of information between your development/donor services team and *program/grantmaking* team?
2. How would you objectively grade the working relationships and flow of information between your development/donor relations team and *finance/operations* team?
3. How would you describe the quality & consistency of your customer service?
4. Do you have staff dedicated to donor services activities?
5. How effectively do you use technology in serving fund advisors and fund holders?

Section IV. Family Philanthropy Capacity

1. Who is the "client" for your philanthropic services – the founding donor or the family?
2. What is your current donor intake and onboarding process?
3. What are your staff's skills in dealing with issues such as family and generational dynamics, family systems, and/or family facilitation?

4. What does a staff member do when he/she realizes specialized help is needed (e.g., family meeting and dynamics facilitation, grant strategy outside of the community foundation's expertise, etc.)?
5. How would your donor services or family philanthropy services staff most likely describe their value-add to families?
6. If a family asks for help in grantmaking, how does that process work?
7. What services are you offering to families of founding donors (sometimes called "Next Generation programs")?

Section V. Your Business Plan and Success Measures

1. Does your foundation know what your donor stewardship and donor service activities cost and what the cost drivers are?
2. How do you determine which donors and/or fund advisors receive which philanthropic services?
3. Our board would expect this timeframe for a *financial* return on investment on our family philanthropy services:
4. How comfortable is your foundation with subcontracting work to experts or partners who can deal with tough issues (e.g. family dynamics, business success planning)?
5. By what success measures are your donor services and family philanthropy services *staff* evaluated?
6. What is the primary success measure of your family philanthropy services?

Definitions

These definitions appear when people click on highlighted phrases in the survey:

- Stewardship Activities – the basic functions of accurately processing and acknowledging gifts, thanking donors over time, keeping accurate records of funds and planned gifts, processing fund statements and grant recommendations, and sending mass communications about the foundation's activities and impact. Effective donor stewardship work provides a grounding for the other services.
- Donor Services – offering donor education programs or events, youth philanthropy programs, and opportunities to give or grant collaboratively with other donors or the foundation's unrestricted grantmaking programs. This also may include more intensive grantmaking, evaluation, or research services for donor-advised funds and basic support for helping donors clarify their goals, interests, and giving styles.
- Family Philanthropy Services – services that actively involve two or more generations of a family in effectively giving, granting, learning, and/or volunteering together. Examples include creating family mission and values statements, facilitating family meetings, creating governance and succession plans, preparing heirs for leadership roles ("next gen programs"), and helping the family engage in community leadership and problem-solving activities.
- Philanthropic Services – the umbrella term for a foundation's portfolio of donor stewardship, donor services, and family philanthropy activities. Those activities may be a mix of basic, intermediate, and customized or concierge services.