

## Community Foundation Family Philanthropy Services Measures of Success Worksheet

This worksheet is designed to help community foundation professionals clarify their goals for serving philanthropic families and identify ways to measure their success in reaching these goals. There are no “right” answers in this exercise. The choices you make will be specific to your foundation, and will closely relate to the foundation’s mission, size, developmental stage, community context and other factors. The value of this exercise should be multifold, impacting such things as: the range of services you provide, your pricing packages, your marketing messages, allocation of resources, etc.

The framework used in this worksheet is based on The Philanthropic Initiative’s *Measures of Success Thought Paper* and original *Measures of Success Worksheet*, other resources on philanthropy and professional services metrics, and feedback from NCFP’s Community Foundations Family Philanthropy Network.

### How to Use the Worksheet

You can complete this worksheet as a group exercise. However, it may be more instructive for individuals to complete it on their own and then compare notes so that you can understand differing expectations. For instance, a board committee might list differing goals and measures than donor services staff.

1. Specify your foundation’s 3-6 priority goals for providing family philanthropy services. You may select these out of the goals listed below, or, if you do not see a priority goal listed, add it in the space provided. Note that:
  - a. The goals are grouped according to primary beneficiaries: the donors, the community foundation, and the community.
  - b. Your donors’ definition of “philanthropy” may be broad – giving, grantmaking, volunteering, activism, impact investing, starting a social enterprise, and more.
2. For each priority goal selected, specify the key measures of success that you would like to use. The examples provided are a mix of short-term and longer-term measures. Feel free to add new measures. To get the most value out of this exercise, we recommend that you limit the number of measures to a manageable few.
3. Summarize your priority goals and measures of success on the final page of this worksheet.



**Donor as Primary Beneficiary**

1. \_\_\_\_\_ Increase understanding of the “why” of giving
  - Have shared interest areas, priority causes with CF
  - Increased clarity of philanthropic motives, personal stories driving generosity
  - Family values, vision, mission, and/or purpose statement created
  - Report philanthropy is more aligned with values and/or faith
  - Report increased gratitude in philanthropic work
  - Other \_\_\_\_\_
  
2. \_\_\_\_\_ Increase expertise and planning in philanthropy
  - Better understanding of community needs, trends
  - More confident in selecting good quality grantees
  - More confident in navigating choices in improving an issue or place
  - Has developed a giving plan
  - Families make progress toward their self-identified goals
  - Practicing more strategic philanthropy
  - Donors make more sophisticated grants; e.g. pooling, matching, PRIs
  - Other \_\_\_\_\_
  
3. \_\_\_\_\_ Increase satisfaction with own philanthropy
  - Increasing amounts of \$ granted from funds over time
  - Report personal time spent in philanthropy is more worthwhile, effective
  - Feel less overwhelmed by choices
  - Less worried about failing or “getting it wrong”
  - Increase belief that grantees are making wise use of gifts/grants
  - Report giving and grantmaking is more impactful
  - Other \_\_\_\_\_
  
4. \_\_\_\_\_ Increase sense of connectedness
  - Report more meaningful interaction with nonprofits and social enterprises
  - Family members are more positive about working together
  - Family members work and learn with generational peers from other families
  - Donors network and engage with other family fund donors
  - Other \_\_\_\_\_
  
5. \_\_\_\_\_ Increase successful family participation in the philanthropy
  - Increased number of family members listed on advised funds
  - More donor advisor meetings with children or grandchildren present
  - More family participation on site visits
  - Successor generations involved in youth philanthropy programs
  - Family members feel less frustrated by challenges such as geographic dispersion, values differences, family conflict
  - Founding generation entrusts successors with more responsibility
  - Other \_\_\_\_\_

6. \_\_\_\_\_ Increase successor preparation for family philanthropy
- Successor generation understands “rules of the road” of their philanthropic tool (DAF, family foundation, supporting org etc.)
  - Successor generation can describe previous generations’ influence on their own philanthropy (family stories, values, important grantees etc.)
  - Successor generation honors and adapts family legacy in own philanthropy
  - Other \_\_\_\_\_
7. \_\_\_\_\_ Family transitions are more successful
- Founding generation more confident in successors’ philanthropy skills
  - Founding generation more confident in successors’ leadership and financial management skills
  - Parents let go and succeeding generations come into their own
  - Successful transition of the philanthropy to the next generation
  - Successor advisors encourage own families to learn about philanthropy
  - Other \_\_\_\_\_

### **Community Foundation as Primary Beneficiary**

8. \_\_\_\_\_ Enhance the CF’s reputation and brand
- CF reputation as first and best resource for charitable advising
  - Press coverage of CF and family giving
  - Donors talk up the program and the foundation as a partner
  - Donors and advisors perceive the family philanthropy package as a benefit, something special, “whether they use it or not”
  - Professional advisors perceive that CF offers a breadth of services to clients
  - Advisors promote the foundation as a source for family philanthropy help
  - Other \_\_\_\_\_
9. \_\_\_\_\_ Deepen relationships with donors/families
- Family members report increased trust in CF’s staff and leadership
  - CEP Donor Perception Report shows increased satisfaction
  - Next generation are increasingly on mailing lists
  - One-on-one relationships established between staff and next gen
  - Participation by family members on CF advisory committees
  - More donor engagement and audience development
  - Other \_\_\_\_\_
10. \_\_\_\_\_ Increase donor and fund advisor use of foundation’s services
- In-bound requests for information, guidance
  - In-bound requests for family meetings or other family philanthropy services
  - Popularity of events and activities associated with the program
  - Next gen attends programming without parents/grandparents
  - Next generation feels comfortable seeking out staff independently
  - Need for additional staff to support family philanthropy
  - Other \_\_\_\_\_

11. \_\_\_\_\_ Increase quality of family philanthropy services
- Participants rate quality of events, programs, services highly
  - Participants rate usefulness of events, programs, services highly
  - Family philanthropy services are sought out by professional advisors
  - In-bound requests for advice from other CFs developing family philanthropy services
  - Other \_\_\_\_\_
12. \_\_\_\_\_ Increase the ROI of family philanthropy services
- Services pay for themselves and/or generate additional income for CF
  - Increased % of break-even or profitable family funds
  - Engagement of new, significantly sized donors
  - Increased number of break-even family funds
  - Other \_\_\_\_\_
13. \_\_\_\_\_ Attract new donors/funds
- More funds opened as a result of the family philanthropy hook
  - Increased number of private foundation conversions
  - Private and family foundations sign on for family philanthropy services
  - Other \_\_\_\_\_
14. \_\_\_\_\_ Gain more discretionary/permanent funds from family clients
- Increased conversion of discretionary to permanent funds
  - Increased bequests to the foundation through discretionary/partner gifts
  - Increased gifts to discretionary funds
  - Other \_\_\_\_\_
15. \_\_\_\_\_ Retain and grow successor generation giving with CF
- Gifts by 2<sup>nd</sup>, 3<sup>rd</sup> generation donors to existing fund
  - Successor generations establish new funds
  - Retention of large funds through the generations
  - Other \_\_\_\_\_
16. \_\_\_\_\_ Increase alignment between donors and foundation priorities
- Donors report trust in foundation's leadership roles and choices
  - Increased number of donor advised gifts to foundation priorities
  - Increased co-investment between donors and foundation
  - Donors partner with foundation on large-scale community projects
  - Donors help foundation increase community impact through volunteering, advocacy, other support besides giving/granting
  - Foundation influences giving of family's office or company
  - Other \_\_\_\_\_

**Community as Primary Beneficiary**

17. \_\_\_\_\_ Increase philanthropic resources to the community
- Giving in region increases (as reported in IRS data, other sources)
  - More flow-through from DAFs to support local nonprofits
  - CF donors encourage others to become more committed donors
  - Press coverage of family giving in the community (not necessarily through CF)
  - New \$ - including illiquid assets from family businesses - goes to philanthropy
  - A larger, more diverse donor pool for the region
  - Other \_\_\_\_\_
18. \_\_\_\_\_ Grow new community donors/leaders
- Family members more confident in board service, community leadership roles
  - Community welcomes and seek family members as volunteers, board members
  - Community welcomes and seek family members as elected officials
  - Younger generations mentored earlier in community service
  - Experienced donors become mentors to next gen of donors outside of family
  - Other \_\_\_\_\_
19. \_\_\_\_\_ Increase alignment of donor philanthropy with community needs
- Donor giving aligns with focus areas of CF's grantmaking
  - Donor use of community indicators or Vital Signs data
  - More strategic investments that line up with community needs and plans
  - Families increase nonprofit sustainability (more grants for GOS, more multi-year grants, less focus on overhead)
  - Donors active in policy change aligned with key community needs
  - Other \_\_\_\_\_
20. \_\_\_\_\_ Increase opportunities for co-learning among donors, CF, community
- More request for family donor learning, family site visits, etc.
  - Families engage other families in giving and volunteering
  - Donors make gifts to organizations they have not previously supported
  - Shift in nonprofit/donor relationships from one of solicitation to more collaborative planning and investment
  - Donors and nonprofits report positive mutual value exchange
  - Other \_\_\_\_\_
21. \_\_\_\_\_ Increase long term commitment of donor families to community
- Long term investment by families in an organization or issue area
  - Family makes transformative gift that keeps successors engaged in community
  - Donors leave endowments to important organizations or places
  - Other \_\_\_\_\_
22. \_\_\_\_\_ Other goal: \_\_\_\_\_

**Goals and Measures of Success  
for our Community Foundation's Family Philanthropy Services**

**Goal #1** \_\_\_\_\_

Measures of Success – indicate on each whether it is short or long term

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**Goal #2** \_\_\_\_\_

Measures of Success – indicate on each whether it is short or long term

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**Goal #3** \_\_\_\_\_

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**Goal #4** \_\_\_\_\_

Measures of Success – indicate on each whether it is short or long term

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**Goal #5** \_\_\_\_\_

Measures of Success – indicate on each whether it is short or long term

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**Goal #6** \_\_\_\_\_

Measures of Success – indicate on each whether it is short or long term

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