

Worksheet 1: Preparation for Assessment

Principles, policies, and practices you've developed throughout your Family Giving Lifecycle guide the success of your assessment plan. This worksheet helps you summarize valuable information for creating an assessment plan in Worksheet 2.

To whom is our philanthropy most accountable? How do we prioritize internal and external stakeholders? How should that affect our assessment planning and processes?

Which *values* or principles that guide our philanthropy should also guide our assessment work?

(For help with this topic, see the [Philanthropic Purpose Primer](#) and the Fundamentals section of this Primer)

Do our conflict of interest, privacy, or communications *policies* have language that can guide who sees the information we collect and how we'll share it. If so, that guidance includes these key ideas:

(For help with this topic, see your existing policies and the [Governance Primer](#))

Have we have defined what success could look like in one or more *priorities* or *social impact goals*? If so, that definition, either aspirational or specific, is:

(For help with this topic, see your existing grant, investing, program, or other guidelines and the [Impact Strategies and Tools Primer](#))

Have we have named one or more measures of success in the priorities or goals above? We could track public data sources, ask our partners to track the measures, or ask evaluators to track the measures over time. If so, those measures include:

(For help with this topic, see your existing grant, investing, program, or other guidelines and the [Impact Strategies and Tools Primer](#))

How do we currently assess progress and success in our philanthropic strategy? What do we want to improve in that assessment process?

How do we currently measure progress and success in our governance and operations? What do we want to improve in assessing our policies and practices in those areas?

(For help with this topic, see the [Governance Primer](#) and [Operations and Management Primer](#))

How do we currently measure progress and success in the preparation and involvement of our family? What do we want to improve in assessing our policies and practices?