



Family Philanthropy Readiness

A Self-Assessment Tool for Community Foundations

Your community foundation is interested in providing more in-depth services to philanthropic families. But how do you know if family philanthropy services closely fit your current mission, market opportunities, capacity, and business model?

The *Family Philanthropy Readiness Self-Assessment* tool helps community foundations assess their current level of readiness to undertake or expand services to multi-branch and/or multi-generational families. The tool is designed for participation by multiple staff at a foundation and has three components:

- 1) An **online survey** with 30 questions in 5 sections: mission and business compatibility, understanding your market, philanthropic services capacity, family philanthropy capacity, and expected business plan and success measures.
- 2) An **individual report** for each survey participant to document her answers, provide preliminary scores and feedback, and free resources to learn more about successfully serving philanthropic families.
- 3) A **group report** that displays the range of the participants' scores, average scores for the group, and more in-depth interpretations of the scores and potential next steps. It provides information on planning a portfolio of philanthropic services and lists helpful resources. And, it lists the individual scores and notes received from all survey respondents. (All scores and notes are anonymous.) The online survey and resulting report will help frame internal questions and decisions about offering family philanthropy services.

The **National Center for Family Philanthropy** launched the tool in June 2017. It is *free* (with registration) to all community foundations. The tool was made possible by grants from the Charles Stewart Mott Foundation and Lilly Endowment, Inc. and by thoughtful guidance of members of NCFP's Community Foundations Family Philanthropy Network and beta testers.

To start the process, visit <https://www.ncfp.org/resource/cfi-self-assessment/>.