



Social Justice Philanthropy Assessment Tool for Family Foundations

This tool is a starting point. This sampling of questions is designed to help you examine where your foundation is right now on its journey towards social justice philanthropy. This assessment is intended to help you think about where you want to go and what steps you can take.

For each question, choose one of the following:

- **Red Light:** Foundation has not gone there.
- **Yellow Light:** Foundation has started conversations about this or taken some first steps.
- **Green Light:** Foundation is fully on board and has completed this action or work is well underway.

	RED LIGHT	YELLOW LIGHT	GREEN LIGHT
Social change philanthropy focuses on the root causes of social, economic and environmental injustices.			
1) Does your foundation know what it funds (issues, communities, strategies, regions) – and why?			
2) Do you know the root causes of those injustices?			
3) Does any of your funding address root causes (as opposed to symptoms)?			
4) Do any of your grantees focus on long-term systemic change (as opposed to changing individuals or their short-term circumstances)?			
NOTES:			
1 goal for my foundation in this area:			
It strives to include the people who are impacted by those injustices as decisionmakers and aims to make the field of philanthropy more accessible and diverse..			
1) Do you know who the communities most impacted by those injustices are?			
2) Do you have relationships in those communities?			
3) Is there a way for non-family members to participate meaningfully in decisionmaking?			
4) Do you actively seek out those most impacted to participate meaningfully in decisionmaking?			
5) Are your foundation's culture, structure, and process accessible to others outside of your family and class background?			

NOTES:			
1 goal for my foundation in this area:			
Foundations are accountable, transparent and responsive in their grantmaking.			
1) Do potential grantees – especially those least likely to have connections and resources – know about your funding?			
2) Are your funding criteria, priorities, and goals readily available and easy to understand?			
3) Do organizations know why they got funded and whether they will be funded again, or if they were not funded, why not?			
4) Can organizations give you feedback on your criteria, priorities, goals, or methods without endangering their funding?			
5) Are grantees involved in your planning and decisionmaking?			
NOTES:			
1 goal for my foundation in this area:			
Donors and foundations act as allies to social justice movements by contributing not only monetary resources but their time, knowledge, skills and access.			
1) Do people in your foundation have connections, knowledge, skills, or other resources that would be useful to your grantees?			
2) Do you make introductions to other funders?			
3) Do you actively organize other family members and/or other individuals with wealth into social justice philanthropy?			
4) Do you actively organize other funders into social justice philanthropy (e.g. showing up in other philanthropy spaces and using your foundation's story to push others to do more)?			
5) Does your foundation's investments align with your values?			
NOTES:			
1 goal for my foundation in this area:			

QUESTIONS TO RESEARCH:

1. How much is the foundation currently giving?
2. How much could it give?
3. What percentage of your family foundation's funding goes to organizations addressing root causes?
4. What percentage goes to communities of color – particularly to organizations led by people of color?
5. Where is your foundation's money invested?

QUESTIONS TO THINK ABOUT:

1. What are the biggest barriers in your foundation to this work?
2. What are the greatest strengths and resources in your foundation for this work?
3. Who are potential allies – both in the foundation and outside of it?
4. If everything goes well, here's how my family foundation will be different in one year:
5. In three years:
6. In ten years:
7. Some skills, knowledge, resources, and/or allies we will need to get there:

QUESTIONS TO THINK ABOUT FOR YOURSELF AND THEN DISCUSS WITH YOUR FAMILY:

Past Giving:

1. What organizations have we given to in the past that are most exciting? Why?
2. What inspires you to do philanthropy? Has it been a worthwhile process so far in your life?
3. What has been the process for deciding how to give? What's good about the current process? What's problematic about the current process?

Social Justice Philanthropy:

1. Does the framework of "social justice philanthropy" make sense to you? What is your vision for short-term change in the world? Long-term change?
2. What issues would you most like to focus on in our funding? What problems that exist in the world could our funding help address?
3. What are the main causes of the issues that you care about?
4. What are some of the barriers or challenges that you see related to this work? What scares you about transforming the family foundation to make it more geared to social justice?
5. What do you envision could come out transforming the family foundation in this way?

Future Giving:

1. How much money do you imagine we could give away over the next five years? 20 years?
2. How much money do you think we should give away on a yearly basis (knowing that at least 5% is required)?
3. How much time do you want to be putting into the foundation?
4. What other goals do you have for your money (beyond your regular annual living expenses)?

NEXT STEPS:

Immediate Action Steps:	
1.	
2.	
3.	
"Accountability Buddies" Contact Info:	Check-in Date: