Culture of Philanthropy Self-Assessment

Where does your organization stand today?

This assessment helps your organization evaluate honestly where it stands across five pillars of a philanthropic culture. Complete it individually, then compare responses across leadership, board, and staff. The gaps between perspectives are often more informative than the scores themselves.

How to use this tool: Rate each statement from 1 to 4, where 1 is not at all true, 2 is sometimes true, 3 is often true, and 4 is consistently true. There is no midpoint on purpose. Answer based on current reality, not aspiration. Complete it independently before comparing with colleagues, then total each section and carry your results to the summary at the end.

Before You Begin: A Two-Minute Reality Check

Name your five largest individual donors from the past two years. For each, name every person at your organization who has an actual relationship with that donor, not simply access to the record. Complete this first; it will make the rest of your answers more honest.

Donor	Approx. annual gift	Who holds the relationship	Who else holds it?

If the person named most often in the third column left next month, which of these relationships would leave with them?

Pillar 1: Leadership Modeling

Strong philanthropic cultures start at the top. Leadership has to model the belief that inviting community investment is essential, not merely acceptable.

#	Statement	Rating (1–4)
1	Our CEO or ED is personally comfortable asking individuals for financial support	_____
2	Our CEO or ED makes a personal financial contribution each year	_____
3	Leadership attends and takes part in fundraising events	_____
4	Leadership raises donor relationships and philanthropy in staff meetings, not only in board meetings	_____
5	Our leaders can articulate the case for giving in clear, compelling language	_____
6	Leadership actively cultivates relationships with current and prospective donors	_____
	Pillar 1 total	**_____ / 24**

Pillar 2: Board Alignment

Boards that are unclear about their fundraising role are a leading barrier to philanthropic growth. Alignment requires explicit expectations, not assumptions.

#	Statement	Rating (1–4)
1	Board members understand their role in fund development before they join the board	_____
2	Every board member makes an annual contribution at a level that is personally meaningful	_____
3	Board members open doors to prospective donors through introductions and connections	_____
4	Fund development is a standing agenda item at every board meeting	_____
5	Board members attend fundraising events and encourage others to take part	_____
6	The board reviews fund development progress and holds the organization accountable to its goals	_____
	Pillar 2 total	**_____ / 24**

Pillar 3: Staff as Storytellers

Program and operations staff are your most credible philanthropic voices. A culture of philanthropy equips them to carry the mission, not to become fundraisers.

#	Statement	Rating (1–4)
1	Any staff member can articulate our mission and impact in sixty seconds or less	_____
2	Program staff are invited into donor events, site visits, or fundraising communications	_____
3	There is a working process for program staff to share client impact stories with whoever handles development	_____
4	Staff understand and embrace their role as ambassadors in the community	_____
5	Our case for giving is part of staff onboarding and orientation	_____
6	Staff are comfortable, and proud, discussing our need for philanthropic support	_____
	Pillar 3 total	**_____ / 24**

Pillar 4: Community as Partners

A culture of philanthropy treats donors as partners: community members who share the mission and choose to invest in it. How you talk about donors reveals whether that belief is real.

#	Statement	Rating (1–4)
1	We consistently use language that frames donors as partners rather than as sources of revenue	_____
2	We have a clear, compelling narrative about why community investment in our work matters	_____
3	Donors receive meaningful stewardship, not transactional acknowledgment	_____
4	We seek to understand what motivates our donors and shape communications accordingly	_____
5	Our fundraising communications lead with real impact rather than financial need	_____
6	New donors are personally welcomed and introduced to our work and our people	_____
	Pillar 4 total	**_____ / 24**

Pillar 5: Shared Ownership

A culture of philanthropy has no single point of failure. Relationships belong to the organization rather than to one person, people can engage before they are asked, and responsibility is distributed rather than delegated.

#	Statement	Rating (1–4)
1	More than one person has a real relationship with each of our largest donors	_____
2	If our lead fundraiser left tomorrow, our donor relationships would stay with the organization	_____
3	People can engage meaningfully with our mission through volunteering, advocacy, events, or site visits before anyone asks them for money	_____
4	Our donor list and our volunteer, advocate, and client lists are treated as one community rather than as separate files	_____
5	Fund development shows up in job descriptions and performance expectations beyond the development role	_____
6	Philanthropy is discussed in program and operations meetings, not only in development and board meetings	_____
	Pillar 5 total	**_____ / 24**

Scoring Summary

Transfer your pillar totals below, then add them for an overall score.

Pillar	Your score	Out of
1. Leadership Modeling	_____	24
2. Board Alignment	_____	24
3. Staff as Storytellers	_____	24
4. Community as Partners	_____	24
5. Shared Ownership	_____	24
TOTAL	**_____**	**120**

What Your Score Means

Score	Stage	What this means
30–50	**Stage 1: Avoidant**	A culture of philanthropy is largely absent. Start with leadership and board alignment before investing in staffing or systems.
51–75	**Stage 2: Willing but Unprepared**	There is openness to philanthropy but the foundations are missing. Focus on explicit expectations and on building the narrative.
76–100	**Stage 3: Emerging Culture**	A real foundation with identifiable gaps. Take your lowest-scoring pillar and treat it as a strategic priority this year.
101–120	**Stage 4: Embedded Philanthropy**	Philanthropy is part of your organizational identity. Focus on deepening it, sustaining it through leadership transitions, and mentoring others.

A note on scores: The lowest possible score is 30, not zero, so a low total is not a failing grade. Treat the pillar scores as more useful than the total: an organization can reach Stage 3 overall while sitting at 8 out of 24 on Shared Ownership, and that single gap is what will undo the rest.

Reflection Questions

Use these in a team debrief after everyone has completed the assessment individually.

- Which pillar scored highest, and what behaviors are driving that strength?
- Which pillar scored lowest, and what is the single most important change you could make there in the next 90 days?
- Where did individual scores differ most across leadership, board, and staff, and what does that gap tell you about how your culture is actually being communicated?
- Did anyone rate Pillar 5 higher than the reality check on page one supports?

Carry These Three Answers Forward

The Philanthropy Culture Action Plan opens with these three fields. Fill them in here so you can move straight into planning.

Our lowest-scoring pillar	
Our readiness stage (1–4)	

Our primary 90-day goal for philanthropy

Next step: Move to the Atrómitos Philanthropy Culture Action Plan, which turns your lowest-scoring pillar into 30, 60, and 90-day actions by role. Culture comes first; once these conditions are in place, use the Fund Development Self-Assessment to build the program itself.

Pillars 1 through 4 adapted from Cynthia Gibson, Beyond Fundraising: What Does It Mean to Build a Culture of Philanthropy? (Evelyn and Walter Haas, Jr. Fund, 2016). Pillar 5 draws on UnderDeveloped (CompassPoint and the Haas, Jr. Fund, 2013) and on Atrómitos client experience.