

# Philanthropy Assessment Tool

## *From Charity to Change*

***A practical self-assessment for equitable and transformative philanthropy***

### Purpose

To help funders, foundations, family offices, Corporate CSR, and grant makers assess how well their practices reflect equity, empowerment, and local leadership. The tool reframes giving from 'helping' to 'sharing power.'

### How to Use This Tool

1. Review each domain (seven total).
2. Score each question 0–1–2–3 depending on how fully your practice meets it:
  - 0 = Not yet started
  - 1 = Emerging effort
  - 2 = Consistent practice
  - 3 = Fully institutionalised
3. Add your total to understand your stage of philanthropic maturity.

## 1. Power & Participation

Question	Score (0-3)
Have community representatives helped define the problem or priority area?	
Do affected communities have decision-making power over grants or project design (not just consultation)?	
Are marginalized groups (women, youth, minorities, persons with disabilities) explicitly included in governance or review panels?	
Is participation compensated (honoraria, capacity support) so it's equitable and not extractive?	
<b>Subtotal (12 max)</b>	

## 2. Local Leadership & Ownership

Questions	Score (0-3)
Are grants directed to local organizations (community groups, cooperatives, local NGOs, social enterprises)?	
Is at least 30% of funding unrestricted or core support for local partners?	
Does your exit strategy strengthen local institutions to sustain results without donor dependency?	
Are you investing in leadership development for local changemakers?	
<b>Subtotal (12 max)</b>	

## 3. Data & Learning

Questions	Score (0-3)
Are data collection and monitoring systems co-designed with local partners and communities?	
Do communities have access and ownership of data that affects them?	
Is data used for learning and adaptation, not just donor reporting?	
Are privacy, consent, and data ethics clearly addressed?	
<b>Subtotal (12 max)</b>	

## 4. Transparency & Accountability

Questions	Score (0-3)
Are funding criteria and decision processes publicly available?	
Do communities have channels to provide feedback or challenge decisions?	
Are impact reports shared in local languages and accessible formats?	
Do you evaluate trust and legitimacy as outcomes, not just financial efficiency?	
<b>Subtotal (12 max)</b>	

## 5. Equity & Inclusion

Questions	Score (0-3)
Have you analysed who benefits most from your grants — and who is left out?	
Are intersectional impacts (gender, caste, race, geography) tracked?	
Do funding guidelines promote equitable partnerships, avoiding extractive subcontracting?	
<b>Subtotal (9 max)</b>	

## 6. Flexibility & Adaptation

Questions	Score (0-3)
Can grantees adjust budgets and strategies as learning emerges?	
Are ‘failures’ treated as learning opportunities rather than penalized?	
Do you conduct annual reflection sessions with grantees and communities?	
<b>Subtotal (9 max)</b>	

## 7. Collaboration & Systems Thinking

Questions	Score (0-3)
Are you partnering with other funders to pool resources and reduce duplication?	
Does your funding complement public systems rather than replace them?	
Are you investing in ecosystem enablers — data platforms, capacity builders, accelerators, community foundations?	
<b>Subtotal (9 max)</b>	

<b>Total Score</b>	
--------------------	--

## Scoring Summary

Range	Level	Description
<b>55-75 points</b>	<b>Transformative Philanthropy</b>	Deeply participatory, equitable, and learning-oriented; community-led.
<b>35-54 points</b>	<b>Evolving Philanthropy</b>	Solid foundation; needs to strengthen shared power, equity, and co-design.
<b>Below 35 points</b>	<b>Traditional Charity Model</b>	Likely donor-driven; rethink power, governance, and community role.