



# Increasing Impact, Enhancing Value

A Practitioner's Guide to Leading Corporate Philanthropy

## Self-Assessment Questionnaire Worksheet

This fillable document contains the questions that are part of *Increasing Impact, Enhancing Value* Self-Assessment Questionnaire, one of the tools on the online *Increasing Impact, Enhancing Value* Self-Assessment Toolkit. This worksheet is designed to facilitate the completion of the self-assessment questions that are part of the self-assessment process.

Users are directed to the online [Toolkit](#) for background on this worksheet, description of the scale, instructions for administration of this worksheet and instructions for scoring and interpreting the results.

This worksheet should be used only as part of the self-assessment process described in the [Toolkit](#) and not as a stand-alone document.

**Name:**

**Company/Foundation:**

**Date of Assessment:**

**Practice 1: Create a new narrative for your corporate philanthropy program as an investment in society** (see details in *Increasing Impact, Enhancing Value: A Practitioners Guide to Leading Corporate Philanthropy*, pp. 18–20)

	Statement is:				
	1. False	2. Partially true	3. Mostly true	4. Entirely true	NA
<b>Indicators of success</b>  Our corporate philanthropy program...					
<b>1. Articulates a purpose that goes beyond “giving” or “donating” to solving social challenges</b> Its objectives/missions/goals include language specifying that the program aims to solve specific systemic social challenges. <i>(Increasing Impact, Enhancing Value: A Practitioners Guide to Leading Corporate Philanthropy, pp. 19-20)</i>					
<b>2. Articulates a purpose that includes helping the business succeed</b> Its objectives/missions/goals include language specifying that the program aims to strengthen the business. (pp. 19-20)					
<b>3. Defines success as beyond outputs to achieving impact/outcomes</b> Defines social and business success not only in dollars, volunteer hours, in-kind giving, or outputs, but also in impacts on societal issues (social impact) and business operations/functions (business impact). (pp. 19-20)					
<b>4. Treats grant recipients as partners</b> Works with grant recipients as collaborators in addressing complex social problems (as opposed to simply “grant recipients,” for example). (pp. 19-20)					
<b>5. Partners with other organizations to more effectively achieve social impact</b> Uses philanthropy as an investment toward collaborations that more effectively address complex social challenges. (pp.19-20)					
<b>Total:</b>					
<b>Average of above scores (divide total, above, by the number of questions with responses other than NA):</b>					

**Practice 2: Develop an inclusive (of corporate interests) model (or “operating system”) for your philanthropic investment that contributes more to society than monetary gifts and promotes business success** (see details in *Increasing Impact, Enhancing Value: A Practitioners Guide to Leading Corporate Philanthropy*, pp. 21-30)

	Statement is:				
	1. False	2. Partially true	3. Mostly true	4. Entirely true	NA
<b>Indicators of success</b>  Our corporate philanthropy program...					
<b>1. Focuses on causes/ways of contributing in which the business has distinctive capacity</b> Invests more heavily in societal issues/ways of contributing in which the company has especially advanced expertise, experience, resources, or an otherwise unusually high capacity. (pp. 21-26)					
<b>2. Focuses on causes/ways of contributing where the business has a material interest</b> Invests more heavily in societal issues/ways of contributing that generate business value. (pp. 21-26)					
<b>3. Goes beyond cash giving to engage a wide set of non-monetary resources</b> Leverages noncash company assets to drive larger scale systemic change than what cash can do alone, e.g., physical space, technology, ad campaigns. (p. 21, pp. 26-27)					
<b>4. Is designed to allow each program component to interact effectively with the others</b> Has an underlying architecture in which grants, employee volunteering, and in-kind giving work synergistically to support each other. (p. 21)					
<b>5. Deliberately balances responsive, strategic, and catalytic philanthropy</b> Balances investments across a mix of activities and approaches to achieve strategic objectives. (pp. 22-27)					
<b>6. Measures and reports social impact</b> Measures and reports (at least internally) not only dollars, volunteer hours, and in-kind giving, but also changes in societal issues (social impact). (pp. 21-27)					
<b>7. Measures business impact</b> Measures and reports (at least internally) business impact. (pp. 27-30)					
<b>Total:</b>					
<b>Average of above scores (divide total, above, by the number of questions with responses other than NA):</b>					

**Practice 3: Professionalize the field** (see details in *Increasing Impact, Enhancing Value: A Practitioners Guide to Leading Corporate Philanthropy*, pp. 31-34)

	Statement is:				
<b>Indicators of success</b>					
Our corporate philanthropy program...	1. False	2. Partially true	3. Mostly true	4. Entirely true	NA
<b>1. Has leadership that understands the social sector context and how to work effectively within it</b> Is led by individuals who understand the relevant social challenges and the actors and efforts addressing them. <i>(Increasing Impact, Enhancing Value: A Practitioners Guide to Leading Corporate Philanthropy, p. 31)</i>					
<b>2. Has leadership that understands the corporate context and how add value to it</b> Is led by individuals with full mastery of the company's external contexts and internal business strategy and organizational culture. <i>(p. 31)</i>					
<b>3. Has top leadership with responsibilities in both philanthropy and relevant business areas</b> Is led by philanthropic leader (e.g., president of the foundation) who is also at the level of corporate vice president or above and has broader responsibilities tied to the core business. <i>(p. 32)</i>					
<b>4. Aligns with other corporate citizen efforts and integrates itself into the business strategy</b> Is highly integrated with the broader corporate citizenship strategy, which in turn is integrated with the business strategy. <i>(p. 32)</i>					
<b>5. Is managed by teams that also manage relevant business areas</b> The management and delivery of philanthropy engages a cross-functional team from across the business and includes operational departments. <i>(p. 32)</i>					
<b>6. Invests in staff professional development at commensurate levels with well-established professions</b> Invests in staff's training, professional association membership, and other development activities as heavily as HR, sales, and other business functions do. <i>(pp. 31-32)</i>					
<b>Total:</b>					
<b>Average of above scores (divide total, above, by the number of questions with responses other than NA):</b>					

**Practice 4: Collaborate, communicate, and share knowledge** (see details in *Increasing Impact, Enhancing Value: A Practitioners Guide to Leading Corporate Philanthropy*, pp. 35-37)

	Statement is:				
	1. False	2. Partially true	3. Mostly true	4. Entirely true	NA
<b>Indicators of success</b>  Our corporate philanthropy program...					
<b>1. Shares results externally</b> Makes publicly available, via annual reports, blogs, Internet content, or other venues, its impact and other achievements. ( <i>Increasing Impact, Enhancing Value: A Practitioners Guide to Leading Corporate Philanthropy</i> , p. 33)					
<b>2. Shares lessons learned with those who would find them valuable</b> Makes available to others working on the same societal challenges what it has learned through its efforts. (p. 33)					
<b>3. Participates in collaborations that are as high-impact and large-scale as the company's scale allows</b> Joins efforts, attends meetings, forms partnerships, and otherwise works with government, nonprofits, and other businesses to address complex societal challenges commensurate with the company's footprint and capacity. (p. 36)					
<b>Total:</b>					
<b>Average of above scores (divide total, above, by the number of questions with responses other than NA):</b>					

**Practice 5: Mobilize “field level” leadership behind practices 1-4** (see details in *Increasing Impact, Enhancing Value: A Practitioners Guide to Leading Corporate Philanthropy*, pp. 38-39)

	Statement is:				
<b>Indicators of success</b>  Our corporate philanthropy program...	1. False	2. Partially true	3. Mostly true	4. Entirely true	NA
<b>1. Promotes practices 1-4 across the field of corporate philanthropy</b> Supports research, projects, conferences, and other efforts to help other companies adopt practices 1-4, above. <i>(Increasing Impact, Enhancing Value: A Practitioners Guide to Leading Corporate Philanthropy, p. 38)</i>					
<b>2. Helps develop the field's future agenda, including helping to evolve practices 1-4</b> Serves on committees, task forces, or other field leadership groups; facilitates field-level dialogue on the path forward described in the guide and/or other issues in philanthropy; or otherwise helps define the next version of the agenda for corporate philanthropy. (p. 38)					
<b>Total:</b>					
<b>Average of above scores (divide total, above, by the number of questions with responses other than NA):</b>					