



Philanthropy-Ready Checklist

filantropia
rethinking philanthropy

2020

How Philanthropy-Ready are you?

Use this checklist to assess where your organisation is at in its journey to become truly Philanthropy-ready, and poised for philanthropy success.

Putting in place all the components of a Philanthropy-ready organisation takes time, and requires a clear focus and understanding of what success looks like. The check list will assist you to gauge where your organisation is up to, and prioritise the steps you need to create a sustainable and successful philanthropy program.

filantropia has been on the 'philanthropy -readying' journey with many not for profit organisations, large and small, and across all causes. filantropia can assist you with any of the element of the Checklist, and more.

Elements

Review & Analysis

- of culture & systems

Board & CEO

- Orientation
&
Engagement

Strategies

- validation
or
design

Enabling Systems & Tools

- validation
or
design

Guidance

- support for
implementation

Checklist

ELEMENTS	ANSWER ‘YES’ OR ‘NO’
<i>Philanthropy culture</i>	Is philanthropy viewed as a strategic organisational asset , and integrated across the organisation?
	Is philanthropy the joint responsibility of the CEO & Board ?
<i>Strategies</i>	Do you have an organisational strategy , designed through a philanthropy lens , that is accessible and engaging for philanthropists?
	Do you have a philanthropy strategy that includes: targets, mission, objectives, systems and tools, deliverables & timeframe?
	Are the relevant sections of your website been designed through a philanthropy lens?

Checklist

ELEMENTS	ANSWER ‘YES’ OR ‘NO’
<i>Enabling systems and tools</i>	Do you have project narratives that include case studies and engage philanthropists?
	Have you created philanthropy personas to identify targets and built a network map to identify philanthropy leads?
	Do you have a stewardship program to build and sustain philanthropy relationships? Does it include identification and packaging of experiences for your philanthropists?
<i>Guidance</i>	Does the organisation have access to philanthropy strategic implementation advice & guidance, as required?

Checklist

ELEMENTS	ANSWER ‘YES’ OR ‘NO’
<i>Board & CEO</i>	Does the CEO <i>understand</i> philanthropy , <i>value</i> philanthropy & is confident to act?
	Does the CEO understand that philanthropy relationships are different from government, corporate & fundraising relationships?
	Does the Board understand philanthropy as a governance issue (risk management of revenue)?
	Is the Board oriented towards, and engaged with, philanthropy ? Do Directors understand their roles & are they confident to act ?

Credentials



TERESA ZOLNIERKIEWICZ
CO-FOUNDER, DIRECTOR

An accomplished executive in financial services, Teresa's career has focused on philanthropy advice and the donor experience. She is a social change influencer; co-designing giving strategies with high net worth clients to deliver impact for causes, and to satisfy personal and family aspirations in philanthropy and legacy.

Teresa is a experienced speaker, editor and author on philanthropy and giving. Her reputation in the philanthropy industry is underpinned by skills that include - leadership, facilitation, creativity, client focus, meta-thinking and the ability to set vision, build confidence and empower people, teams and other leaders.

Teresa is the Chair of the Melbourne International Film Festival, and member, Committee of management of the Mirabel Foundation. She holds a Master of Management, Bachelor of Arts and Diploma of Education and is a Graduate of the Australian Institute of Company Directors.

ROBYN CHARLWOOD
CO-FOUNDER, DIRECTOR

Robyn is an experienced not for profit leader and CEO, philanthropy strategy designer and relationship expert.

Robyn's ability to transfer skills across sectors has seen her traverse from leadership of a major Australian charity to strategy and relationship development in the financial services industry, particularly in philanthropy. Robyn has co-created a global philanthropy strategy for a major corporation, project managed the creation of a world first digital giving tool and developed a philanthropy strategy for Asian high net worth clients.

Robyn uses her business acumen, diverse career experience and strong interpersonal aptitude to skilfully connect people and communities of interest for mutual benefit.

Robyn is a Williamson Community Leadership alumnus, Member, Advisory Committee for Ashton Nixon Bequest and Advisory Board Member of University of Tasmania's Wicking Dementia and Research Centre.

Robyn holds a Bachelor of Science [Hons], Graduate Diploma of Nutrition and Dietetics and Bachelor of Arts (Fine Arts).





Contact us:

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organisation and your needs:

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