



Philanthropic Cultural Perception Audit™

Background

The Philanthropic Cultural Perception Audit™ is a survey tool developed by Global Philanthropic to assess your organization's culture as it relates to fund development practice. Peter Drucker coined the expression, "culture eats strategy for breakfast", and we know from personal experience that those organizations that kick private investment goals out of the ball park have fostered a culture of philanthropy and support that capitalizes and leverages the good will of internal and external stakeholders, beginning with board and executive leadership.

The goal of the perception audit is to understand exactly how well is an institution positioned with internal audiences, stakeholder readiness for personal involvement, and the strategy implications for a comprehensive institutional model.

The overarching questions of the perception audit are:

1. How strong is the institution's culture of philanthropy?
2. Do the organization's leaders understand their roles in building and sustaining a culture of philanthropy?
3. Do the Development Office's key stakeholders truly understand what it does and how it contributes to the institution's success?

As the audit survey tool has been adapted for online delivery, the process targets senior leadership, key members of the governing board, development, and community relations staff, as well as selected donors and volunteers. The audit can be customized to collect data from various stakeholder groups within the organization. The audit will thus engage stakeholders across all areas of the institution's life.

Using Survey Monkey™ to collect and analyse data, Global Philanthropic will ask the target group (potentially an unlimited number of survey respondents) to consider the nine areas of advancement practice:

1. Governance Environment
2. Fundraising Track Record
3. Community Relations Track Record
4. Constituency Analysis
5. Program Maturity
6. Resource Availability
7. Fundraising Culture
8. External Environment
9. The Donor Perspective.

We can also create a section that addresses the specific culture and context of the institution, its geographic catchment areas and audiences.

For each of the 90 questions (10 per area of practice), respondents will be asked to consider, “**Do we operate this way?**” and “**Should we operate this way?**” The survey tool thus obtains a snapshot of the culture of philanthropy the organization has built up along four lines:

1. **Perceptions:** What do key staff and volunteers perceive about the institution’s development and community relations program?
2. **Alignment:** Are there perception differences between key individuals and segments? Are there cross-institutional differences?
3. **Knowledge:** How well do staff and board members understand development and engagement strategy and their role in a campaign?
4. **Gaps:** How significant are the gaps between perception, best practice and performance?

The data is then collected, analysed and presented in graphic and text form. The findings allow the institution to identify perception gaps in a targeted manner. It is particularly useful in identifying knowledge and communications gaps, and for targeting training to the themes and teams where needs are greatest.

We will work with the project team to determine how best to introduce this audit process into the mix to maximize uptake by staff.

Potential Audiences

The Philanthropic Cultural Perception Audit™ tool is designed for an internal audience. Given the online delivery, it can be scoped to be as inclusive as deemed appropriate as a next step in facilitating wider participation and buy-in of internal stakeholders. The exact number of participants will be determined in consultation with the CEO and the Project team.

Recommended audience for the Cultural Perception Audit:

1. The institution’s CEO and President
2. Chair, Vice Chairs and members of the Board of Directors
3. All members of the Senior Management Team
4. All members of the Development and Community Relations Team
5. Operational and Administrative leadership including Directors
6. Others as deemed relevant to the institution’s Community Relations portfolio
7. Selected industry partner representatives
8. Selected donor representatives
9. Selected community representatives



Outcome

A complete set of data and analysis for the organization's Philanthropic Culture Perception Audit™. The information includes a graphic portrayal against each practice statements: (A) Do we operate this way? and (B) Should we operate this way? and an interpretation of the results.

Included will be an analysis of the relative importance of each practice and potential impact on the organization if corrective measures are taken.

1. **Importance:** How important is addressing this Best Practice Statement in the next 12-18 months?
2. **Impact:** If addressed, what impact would it have on the organization's fund development culture and performance in the next 5 years?

Based on this analysis, recommendations of possible actions could be presented, and reviewed by senior management and the Board of the organization.

For more information on how The Philanthropic Cultural Perception Audit™ could be tailored for your organization, please contact:

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