<table>
<thead>
<tr>
<th>Theory of Philanthropy Sample Elements</th>
<th>Clarity and Coherence Scale</th>
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</thead>
</table>
| **Purpose and niche** - What is the foundation’s approach to funding? What are funding priorities, areas of focus, and boundaries around what is and is not eligible? What are the foundation’s mission, vision, and other defining statements? How are these used? | ○ NA – We don’t even talk about this element of philanthropy  
○ 1 – We talk about this element but have little to no clarity or coherence  
○ 2 – Some clarity and coherence exist but there are some major differences in perception or opinion  
○ 3 – We are generally clear and share coherence about this element with some small differences or variation  
○ 4 – We are crystal clear, and everyone is on the same page |
| **Leadership** - How is leadership conceptualized? What are primary leadership roles? Who is viewed as a leader? Doing what? Why? What’s the foundation’s philosophy about leadership (if it has one)? | ○ NA – We don’t even talk about this element of philanthropy  
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| **Endowment** - How are the Foundation’s endowment assets? To what end? | ○ NA – We don’t even talk about this element of philanthropy  
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| **Evaluation** - What kinds of evaluations are conducted for what purposes? Does the foundation support a specialized communications person or unit? Why? To whom does the evaluation function report? Where in the foundation does evaluation expertise lie? How has the evaluation function changed over the years? | ○ NA – We don’t even talk about this element of philanthropy  
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| **Risk** - How does the foundation conceptualize risk? What is at risk? Funds? Reputation? Brand? What is the tolerance for risk? What kind of risk assessment is included in grant-proposal reviews, if any? Who does the risk assessment? Who uses it? | ○ NA – We don’t even talk about this element of philanthropy  
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○ 2 – Some clarity and coherence exist but there are some major differences in perception or opinion  
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| Collaboration - How does the foundation view collaboration, partnering, or other ways of describing joint endeavors? To what extent and in what ways is collaboration a priority for grantees and/or the foundation itself? | ○ NA – We don’t even talk about this element of philanthropy  
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| --- | --- |
| Use of consultants - To what extent does the foundation use consultants? For what purposes and in what capacities? What are policies about and rationales for using consultants? | ○ NA – We don’t even talk about this element of philanthropy  
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