

# Candid.

## Does your foundation have glass pockets?

Use this checklist to assess the transparency of your foundation's website. Use the checkboxes in the lefthand margin to identify the disclosures your website currently shares. Before you check a box, go to your website to verify the information is where you think it is. Use the notes fields to track improvements you might make and share internally with relevant colleagues. Once you've completed inventorying the transparency of your foundation's website, refer to the chart on the last page to determine your website's current transparency level and plan for next steps. If you have questions, contact [funderlearning@candid.org](mailto:funderlearning@candid.org).

### GENERAL INFORMATION

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**Contact information:** Increase the potential for collaboration and sector efficiency by making it easy for peers and potential partners to find a path to connect with someone inside the foundation.

*Do you share the following points of contact on your website: telephone number, email/online form, and mailing address?*

Notes:

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**Mission statement:** Increase understanding about your institution's work and build credibility and public trust by posting your organization's mission statement.

*Is your mission or purpose statement shared on your website?*

Notes:

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**Key staff list:** Humanize your institution by using your website to reveal the people inside the foundation. This also serves to increase the potential for collaboration and coordination, leading to greater sector effectiveness and efficiency.

*Are the names of executives and program staff shared on your website?*

Notes:

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**Key staff biographies:** Build credibility and public trust by providing professional biographies for foundation executives and program staff. Staff biographies can also serve to help outside stakeholders find points of connection with those inside the foundation.

*Are biographies of executives and program staff shared on your website?*

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**Board of Directors list:** Build credibility and public trust by using your website to reveal details about who is in charge of the foundation's governance. Taking the extra step of posting board members' affiliations helps outside stakeholders better understand the network and sphere of influence of the foundation.

*Does your website include a list of Board members, including their affiliations?*

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## GOVERNANCE AND POLICIES

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**Bylaws:** Bylaws are an important governance document that serves as the operating manual for your foundation. Build credibility and public trust by using your website to reveal the details about how your foundation is governed.

*Does your website include a copy of the foundation's governing bylaws?*

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**Committee charters:** Build credibility, public trust, and greater understanding with outside stakeholders of the governance roles and structure of your foundation.

*Does your website include the foundation's committee charters?*

Notes:

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**Code of conduct:** Build credibility and public trust by sharing values and policies that demonstrate your organization’s commitment to professional and ethical conduct.

*Does the foundation’s website make its policies guiding foundation staff conduct available?*

Notes:

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**Conflict of interest policies:** Build credibility and public trust by sharing policies that demonstrate your commitment to professional and ethical conduct.

*Does your website include the foundation’s conflict of interest policy?*

Notes:

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**Open licensing policies:** Does the foundation clearly specify what can and cannot be done with intellectual property it produces and/or funds? Broadly speaking, an open license is one which grants permission to access, re-use, and redistribute a work with few or no restrictions.

*Does the foundation use its website to specify what can and cannot be done with intellectual property it produces and/or funds?*

Notes:

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**Transparency values/policies:** Build credibility and public trust by sharing values and policies that demonstrate your organization’s commitment to transparency and openness.

*Does the foundation’s website provide information about its values and/or policies relative to disclosures, openness, and transparency?*

Notes:

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## STAFFING AND DIVERSITY DATA

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**Whistleblower procedures:** Build credibility and public trust by sharing policies that demonstrate your commitment to professional and ethical conduct.

*Does the foundation's website make policies regarding the reporting of financial improprieties or other misconduct available?*

Notes:

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**Executive compensation process:** Build credibility and public trust by opening up the process by which you set executive compensation.

*Does your foundation's website describe the process used to determine executive compensation?*

Notes:

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**Diversity, Equity, & Inclusion values/policies:** Build credibility and public trust by sharing values and policies that demonstrate your organization's commitment to diversity, equity, and inclusion.

*Does the foundation's website provide information about its commitment or policies relative to diversity, equity, and inclusion?*

Notes:

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**Demographic data:** Demonstrate that your organization prioritizes diversity, equity, and inclusion by sharing demographic data.

*Does your foundation's website share statistical information about the demographics of the foundation's workforce and board leadership?*

Notes:

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## GRANTMAKING INFORMATION

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**Grantmaking process:** Save valuable foundation and nonprofit staff time by clearly explaining the process by which the foundation selects its grantees. Include application guidelines, or if applications are not accepted, explain how one can introduce their work to your institution.

*Does your foundation's website explain how the foundation selects its grantees [application process or pre-selection]?*

Notes:

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**Grantmaking strategy/priorities:** Save valuable foundation and nonprofit staff time by posting information that clearly outlines the foundation's area of focus so website visitors can quickly determine if there is alignment between the foundation's priorities and their organization's work.

*Are the foundation's grantmaking priorities or strategy clearly outlined on your website?*

Notes:

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**Searchable grants database or categorized grants list:** Bring your work to life by using your website to share data about your grants and grantees. Foundation priorities are often broad; seeing recent grant descriptions give outsiders greater insight into your work and current directions.

*Does your foundation's website include a searchable database or a categorized list of the foundation's grants?*

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Note: a grants list is acceptable for foundations with fewer than 200 grants per year. A grants list should include recipient name, grant amount, and recipient location information.

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## PLANNING AND PERFORMANCE MEASUREMENT

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**Assessment of overall foundation performance:** Demonstrate your commitment to creating a culture of shared learning across the field by opening up how your foundation measures its progress toward institutional goals.

<i>Does your foundation's website include a comprehensive assessment of overall foundation performance and effectiveness that measures progress toward institutional mission and goals?</i>	Notes:
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**Knowledge center:** What shortcuts might your foundation's lessons learned create for peers and partners? Encourage others to learn from your work by providing a central access point to the knowledge the foundation has commissioned or produced.

<i>Does your foundation's website include a landing page that provides a collection of the foundation's program evaluations, reports, and lessons learned?</i>	Notes:
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**Applicant & grantee feedback mechanism:** Strengthen relationships with grantees and create a culture of continuous improvement by making it easy for stakeholders to provide ongoing feedback via your website.

<i>Does the foundation's website invite applicants and grantees to provide feedback?</i>	Notes:
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**Grantee surveys:** Strengthen your foundation and its relationships with grantees, by surveying them to learn how to improve your work. Demonstrate your commitment to improve and potentially influence other funders in your field by sharing what you learned and what has changed as a result of the survey.

<i>Has the foundation conducted a survey of its grantees? Do you share the results publicly on your website?</i>	Notes:
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**Strategic plan:** The problems foundations address are large ones that require collective action to solve. Sharing your strategic road map helps peers and partners understand if and where they might align, and how to join you on the journey.

*Does your foundation use its website to explain how the foundation defines its overall strategy, direction, and priority setting?*

Notes:

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## FINANCIAL INFORMATION

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**Audited financial statements:** Build credibility and public trust by providing a link to your foundation's audited financial statements on your website.

*Does the foundation's website provide access to recent audited financial statements?*

Notes:

**Government Annual Return:** The Government Annual Return (990 or non-US equivalent) is an important regulatory document that annually provides a mechanism for transparency about your foundation's governance, finance, operations, and expenditures. Demonstrate your commitment to transparency by providing a link to your most recent government annual return on your website.

*Does your foundation's website provide access to recent government annual returns (990 or non-US equivalent)?*

Notes:

**Investment policies:** The majority of foundation endowments are invested in stocks. Build credibility and public trust by explaining your foundation's approach to managing your institution's investments.

*Does your foundation's website provide access to policy statements about how the foundation invests its endowment?*

Notes:

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## COMMUNICATIONS CHANNELS

Though not formal transparency indicators, the use of multiple communications channels can facilitate greater accessibility and understanding of your work. The following are channels to consider to share your work more broadly:

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### **E-Newsletter**

*Does the foundation use e-newsletters and make sign-up for them available via its website?*

Notes:

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### **Blog**

*Does the foundation maintain a blog and make it available via its website?*

Notes:

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### **Social media/networking sites**

*Does the foundation communicate about its work and engage with its audiences via social media/networking platforms?*

Notes:

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## Assessing your website's evolving path to transparency

Transparency and openness increasingly appear as stated values on many foundation websites, but how do you make progress toward those ends? The “Who Has GlassPockets?” transparency self-assessment is designed to help foundations create a roadmap to improving their website’s transparency. Though there are 26 indicators on the assessment, the expectation is not that all, or even a majority of these should be in place all at once. Nor is it intended to be an activity that has an end point. Rather, it evolves over time, and ideally is a process your institution revisits on a regular basis. This chart is intended to help you in that process.

Based on an analysis of the more than 100 foundations that have used the transparency self-assessment and shared their results with us, patterns of how transparency evolves in institutional philanthropy are becoming clearer. To help your foundation chart its transparency course, based on the data we collected, the chart below outlines core, advanced, and champion-level website transparency practices and represents an optional guide that can be helpful to understanding your website’s current transparency level.

	CORE TRANSPARENCY up to 9 indicators	ADVANCED TRANSPARENCY 10-18 indicators	CHAMPION TRANSPARENCY 19 or more indicators
<b>Who are you?</b>			
Contact information	✓	✓	✓
Key staff list	✓	✓	✓
Key staff biographies	✓	✓	✓
Board of directors list	✓	✓	✓
DEI Values/policies		✓	✓
Demographic data		✓	✓
Committee charters			
<b>What do you do?</b>			
Mission statement	✓	✓	✓
Grantmaking priorities	✓	✓	✓
Searchable/categorized grants		✓	✓
Strategic plan			
<b>How do you do it?</b>			
Grantmaking process	✓	✓	✓
Government annual return	✓	✓	✓
Audited financial statements	✓	✓	✓
Bylaws		✓	✓
Code of conduct		✓	✓
Conflict of interest policies		✓	✓
Transparency values/policies		✓	✓
Whistleblower policies		✓	✓
Investment policies			
Open licensing policies			
Executive compensation process			
Applicant/grantee feedback mechanism			
<b>What difference does it make?</b>			
Knowledge center		✓	✓
Grantee surveys			✓
Foundation performance assessment			