



RAMPING UP FOR HIGH-IMPACT PHILANTHROPY

A TOOLKIT FOR FUNDERS

This toolkit is for seasoned donors, donor advised fund holders, foundation trustees, and staff who are taking steps to significantly ramp up the impact of their giving. No longer content with just “making good grants” or “doing good things for the community,” you have taken a fresh look at your goals, strategies, and outcomes and decided that you could do things differently to achieve even more.

We all know that setting bolder, bigger goals for impact is only step one. Implementing strategies and achieving these goals typically involves a winding path full of experiments, iterations, and obstacles. This toolkit is crafted to help seasoned funders anticipate common obstacles to high-impact philanthropy and learn about effective strategies to overcome them.



WHAT IS HIGH-IMPACT PHILANTHROPY?

High-impact philanthropy will mean different things to different funders. It might mean reaching more people or places, preventing a problem from occurring in the first place, having a more sustainable or systemic effect, or achieving leverage with your grant dollars. For you, it might encompass all these and more.

Although funders may define high-impact philanthropy in different ways, we see some fundamental shared qualities in all high-impact giving:

- ✓ **Clear outcome goals**—Goals are essential, of course, if you are to know whether you've been successful in achieving impact. These may be quantitative and/or qualitative. They may include short-term or intermediate goals if the time frame for true outcome measures is long.
- ✓ **Deep knowledge of focus areas**—The knowledge you acquire when you focus your giving is critically important to revealing the most urgent needs, opportunities, trends, and key players.
- ✓ **Effective and coordinated strategies**—High-impact givers match their strategies to their goals and include not only specific approaches to grantmaking but also amplification strategies such as influence, convening, knowledge, and collaboration.
- ✓ **Established learning plan and practices**—Incorporating your learning into improved strategies and execution is necessary for impact, but too often overlooked.

If you are interested in learning more about high-impact strategies for giving, we encourage you to review Exponent Philanthropy's publication "Getting to Impact Through Planning" and use its "10-Minute Impact Assessment."

WHAT ARE COMMON OBSTACLES TO HIGH-IMPACT PHILANTHROPY?

The obstacles you face in ramping up for impact—and the strategies you use to overcome them—will depend on a number of factors: funder history, leadership, capacity, context, and specific goals to name a few. How these manifest themselves depends on where you are on the journey to high impact: Are you in the early stages of assessing whether you want to make changes? Are you ready to go, with goals in hand? Or are you deep into the ramp-up process and encountering challenges?

We see five stages along the journey to high-impact philanthropy (below) and, in this toolkit, we explore obstacles that often present themselves at each stage.

- 1 Dynamics and readiness**
- 2 Planning and focus**
- 3 Capacity and implementation**
- 4 Context and collaboration**
- 5 Learning and adaptation**

As you move through your journey, you may see obstacles shift from internal issues (e.g., key decision makers are not ready to make necessary changes, your giving is too broad) to external ones (e.g., an unfriendly policy landscape, limited nonprofit capacity). You may also find that failing to address an early obstacle will prevent you from progressing toward later stages.

Use the self-diagnostic that follows to identify where you are currently encountering or are most likely to encounter obstacles in your efforts to ramp up for high impact.



SELF-DIAGNOSTIC

This diagnostic is designed to help you recognize your obstacles to high impact. Before taking the diagnostic, identify the key decision makers in your philanthropy and consider how they think and act in the context of your work together. Donor advised fund holders may want to consider other family members. Unstaffed foundations, consider your board. Staffed foundations, consider your board and key staff members.

For each category, consider whether the statements apply to the attitudes and behaviors of your organization's key decision makers ("you"). Rank each question on a scale from 1 (strongly disagree) to 5 (strongly agree). At the end of each section, add up your scores and enter the total in the appropriate box at the bottom of the page.

DYNAMICS & READINESS	STRONGLY DISAGREE					STRONGLY AGREE
You actively seek to understand what nonprofits are achieving with your funding.	1	2	3	4	5	
You speak openly about the importance of creating more impact.	1	2	3	4	5	
You are willing to set aside personal agendas to create a more focused strategy.	1	2	3	4	5	
You are open to learning and adjusting your expectations about the causes of and solutions to problems.	1	2	3	4	5	
You have appropriate and necessary governance structures and practices in place for effective decision making.	1	2	3	4	5	

PLANNING & FOCUS	STRONGLY DISAGREE					STRONGLY AGREE
You have embarked on or already undergone a planning process (formal or informal) to identify strategic focus areas for your giving.	1	2	3	4	5	
You have identified and agreed on one or a few strategic focus areas for your giving.	1	2	3	4	5	
You have discussed and agreed on the goals and outcomes you want your giving to achieve, not just the issue area(s) you want to fund.	1	2	3	4	5	
You award the majority of grants/gifts in alignment with the identified focus area(s) or strategy.	1	2	3	4	5	
You are committed to investing in specific focus area(s) for an extended period.	1	2	3	4	5	

CAPACITY & IMPLEMENTATION	STRONGLY DISAGREE					STRONGLY AGREE
You have sufficient administrative infrastructure to implement your funding strategies.	1	2	3	4	5	
You allocate sufficient resources (e.g., grant dollars, staff and board time) in accordance with your priorities.	1	2	3	4	5	
You access knowledgeable and appropriate support to implement your funding strategies.	1	2	3	4	5	
You provide consistent attention over a long period to achieve your impact goals.	1	2	3	4	5	
You understand the importance of building internal capacity to help create impact.	1	2	3	4	5	



SELF-DIAGNOSTIC

CONTEXT & COLLABORATION		STRONGLY DISAGREE				STRONGLY AGREE
You understand that creating impact can take a long time and cannot be accomplished in isolation.	1	2	3	4	5	
You regularly consult with other players in your focus area(s) to learn from one another and ensure coordination.	1	2	3	4	5	
You understand the public policy landscape within your focus area(s).	1	2	3	4	5	
You actively seek to pursue various strategies to move the needle in your strategic focus area(s) (e.g., advocacy, convening, technical assistance).	1	2	3	4	5	
You are nimble and have the flexibility to respond to shifts in the environment.	1	2	3	4	5	

LEARNING & ADAPTATION		STRONGLY DISAGREE				STRONGLY AGREE
You understand the importance of developing a long-term strategy, and evaluating and adjusting it as time goes on.	1	2	3	4	5	
You routinely evaluate nonprofits on their progress toward your shared goal.	1	2	3	4	5	
You use quantitative and qualitative data to evaluate grants/gifts.	1	2	3	4	5	
You adjust your strategies based on what you learn from evaluations.	1	2	3	4	5	
You evaluate your entire portfolio of grants/gifts, not just one grant or project at a time.	1	2	3	4	5	

DIAGNOSIS	DYNAMICS & READINESS	PLANNING & FOCUS	CAPACITY & IMPLEMENTATION	CONTEXT & COLLABORATION	LEARNING & ADAPTATION
Total Score (5–25)					

In which areas did you score low? These are the stages in which you are likely to encounter the most obstacles to high impact—and great places to start. In the pages that follow, we outline strategies to overcome obstacles in each of the five stages of your journey, and provide case studies to demonstrate these strategies in action. At the end of the toolkit, you will find a planning sheet to document your next steps.



If you scored low in this section, you may be facing fundamental obstacles related to key decision makers' lack of engagement, decision-making dynamics, or sense of shared purpose. Here are some strategies that your peers have used to overcome these obstacles.

Engage key decision makers

Disengagement might simply be the result of very busy lives, or it could be that decision makers are not fully committed to or don't know how to ramp up your impact. Try this:

- **Conduct a strategic planning retreat**—Hire an experienced philanthropy consultant to work with key decision makers to clarify their goals and ambitions for ramping up your impact. This planning process can be highly energizing and help participants understand what it will take to ramp up.
- **Hear from expert speakers and/or peer funders**—A knowledgeable speaker who has had on-the-ground success can inspire your decision makers to think bigger and commit more time.
- **Recruit new members to your decision-making group**—It could be time to rejuvenate your board or senior staff through recruitment of new members with a greater appetite for high impact.
- **Establish task forces**—Provide key decision makers with specific time-limited tasks that educate, engage, and expose them to substantive issues.

Improve interpersonal dynamics

If challenging interpersonal dynamics are present among your key decision makers, it can be hard to move toward high-impact grantmaking. Start here:

- **Strengthen governance policies and practices**—Codify how decisions are made and by whom. Ensure that the agreed upon governance policies and practices are enforced.
- **Hire a family systems or organizational behavioral expert**—Depending on the nature of the dynamic, an expert consultant can help your decision makers develop more empathy for one another and agree upon codes of conduct.

Identify your shared purpose

Each key decision maker comes to this work with a unique point of view on the best and most important uses for your resources. Some may advocate for their personal interests over and above shared interests. Use these approaches:

- **Create a learning agenda**—Invest in or refresh research on a few areas of focus. This could include inviting presentations by content experts about specific issues, gaps, or needs; commissioning research on a particular issue; or conducting site visits with key organizations working on these issues.
- **Allocate resources for discretionary giving**—Provide key decision makers with the opportunity to use a small amount of resources each year to invest in their individual passion projects. This can help them set aside personal agendas and become more focused on shared goals and strategies.



A low score in this section suggests that your obstacles are connected to refining your focus, letting go of legacy grantmaking that does not fit your new strategy, or apprehension about setting big, measurable goals. Here are some strategies that may help you navigate this period of transition.

Focus your giving

In the early stages of giving, many donors “try on” a variety of issue areas and strategies, often establishing broad focus areas like education or health. Moving to a more focused strategy often can be overwhelming. Narrow your focus via these approaches:

- **Assess past giving**—Review the successes and failures of past work to identify grants or areas in which you have had the most impact. Ask others about your most effective giving via grantee surveys or community perception reports.
- **Conduct research to better understand key needs and gaps**—Within your broad interest areas, conduct landscape scans, learning tours, or desk research to identify key needs and gaps, and uncover specific areas in which you can deepen your impact. Be sure to include an analysis of government funding streams and policies.
- **Engage in a strategic planning process**—Pair your review and research with a structured planning process. This provides key decision makers with the space and time to reflect on research findings and come to consensus on next steps.

Address legacy grantmaking

As you shift and refine your focus, it is not unusual to identify legacy grants and activities that no longer serve your strategy. It can be challenging to exit these relationships in a thoughtful manner. Funders make these suggestions:

- **Identify other funders who might take over these grants**—You have the standing and often the relationships to help your grantees connect with other potential funders.
- **Develop an exit strategy**—It is good practice to create an exit plan early in a funding relationship. In the case of a shift in strategy, you may need to initiate the exit sooner than expected. Clear communication and a realistic time frame are key components to gracefully ending funding relationships.

Set bigger, measurable goals

To increase the impact of their giving, many funders find they must embrace an outcomes-based approach and set ambitious and measurable goals. Your key decision makers may worry that these goals are too “pie in the sky” or that your giving cannot produce the goal in isolation. Yet these goals not only inspire you but also help you define and refine your strategy. Try this:

- **Establish an overarching framework or theory of change for your funding**—A theory of change identifies how your giving will contribute to the results you seek (along with other players) and provides a framework for establishing indicators of success and interim milestones.
- **Build in regular reviews of progress against indicators**—To continually improve and advance your strategy, you must commit to regularly reviewing your progress to ensure that you are on the path to achieving your goals and milestones. Consider establishing and maintaining a scorecard to use in evaluating indicators.



Low scores in this section indicate that your impact strategy is out of sync with your operational capacity and practices. This mismatch could result from an old staffing model that no longer suits your strategy, a shift in the type of expertise needed, or a reluctance to reallocate resources. Here are a few strategies that other funders have used to successfully address these challenges.

Assess your staffing model

Foundations that update their strategic direction don't always think about how their staffing aligns with their new strategy. You might be moving your approach from a large number of small grants that need lots of administrative support to one that prioritizes fewer, larger grants that require more technical expertise. Or the board might have been able to manage the foundation's work on a volunteer basis, but a shift in strategy might require more time than the board has available. Start here:

- **Review resource allocation**—Devote time to review and assess the tasks staff need to accomplish to achieve your new strategic goals. Then allocate staff time and resources to align with these new objectives.
- **Benchmark**—Look to the field to see how funders of a similar size staff their organizations. Resources like Exponent Philanthropy's *Foundation Operations and Management Report* can help.
- **Be intentional about shaping culture**—Your new strategy may require a change in board and/or staff culture. Take advantage of existing tools to help you identify your current culture and the changes that may need to happen.

Secure sufficient expertise

After a shift in strategy, you might find that you or your staff do not have sufficient expertise to implement your new strategy. Try these approaches:

- **Invest in professional development**—Sometimes the easiest way to boost your expertise is to spend time on professional development. Dedicating funds and time for online classes, conferences, or other professional development activities can be a great, relatively low-cost approach to improving your organization's expertise.
- **Add new hires**—With a significant change in strategy, sometimes the only way to add the necessary level of expertise is to bring in a new hire. Consider the gaps in your and your staff's expertise and create a job description that emphasizes those attributes.
- **Consider using consultants**—Consultants can add a high level of expertise on a wide variety of subjects that might be difficult to find in one or two staff members. Using consultants also can be more cost effective than hiring permanent staff, and consultants are easily engaged for flexible amounts of time. You could hire a consultant to help with a three-month data evaluation project, or for three years to provide public relations support to promote your nonprofit partners.

Invest in yourselves

Sometimes key decision makers are reluctant to invest in internal capacity because it diverts funds from grantmaking activities. Although this sentiment is admirable, building internal capacity can lead to better support for grantees and higher impact. Address reluctance with these tactics:

- **Set a learning agenda**—Reluctance to invest in capacity often comes from a scarcity mindset. Take time to educate your decision makers about how improved internal capacity can make funding more efficient and effective—for you and for the recipients of your grants/gifts.
- **Benchmark your spending**—Determine how much other organizations spend on administration. Exponent Philanthropy's *Foundation Operations and Management Report* can be helpful.



Low scores in this section may be associated with challenges identifying and working with collaborators, limited nonprofit capacity, or trouble adapting to an uncertain public policy landscape. Although no one can prepare for all environmental obstacles. Here are a few strategies to help you navigate these ever-shifting challenges.

Find and nurture opportunities for collaboration

If you have historically worked independently and/or are moving into a new focus area, try these ways to cultivate potential collaborators:

- **Actively participate in your community or area of focus**—Meet others who have shared interests, including peer funders, government officials, and nonprofit practitioners. Seize opportunities to work on committees with like-minded people who could be future collaborators.
- **Build a funder network**—If a funder network for your focus area does not already exist, start one, or, as a first step, host a meeting to explore interest.
- **Form closer and more open relationships with grantees**—Your grantees have their fingers on the pulse of this work. Ask them to help you think about potential collaborators.

Decisions on collaboration issues such as leadership, cost-sharing, staffing, composition, priorities, and timeline can be difficult to negotiate and complex to manage. To set up your collaboration for success:

- **Establish clear, shared goals**—It is essential that collaborators agree upon and commit to a few clearly articulated goals. Build in metrics and accountability systems that track these goals.
- **Make it easy to “plug and play”**—If you are looking for a broad set of collaborators, you may want to establish a structure that makes it easy for others to join and participate.
- **Keep your board informed**—Collaboration often requires compromise and shared control. Be sure to keep key decision makers up to speed on the reasons for any changes.

Address nonprofit capacity

In certain geographic areas or new fields of interest, it can be difficult to find experienced nonprofit partners to fund. Existing organizations may be capacity constrained due to limited funding or talent. Other funders make these suggestions:

- **Find partners in unusual places**—If traditional 501(c)(3) organizations are not to be found, consider working with churches, schools, hospitals, or business associations.
- **Provide training, networks, and support**—Provide professional development grants to nonprofits or sponsor workshops for the community of nonprofits in your area. Facilitate network building through regular, informal meetings.
- **Replicate best-in-class programs from other regions**—Choose highly effective programs that have a track record of successful replication in new locations.

Tackle an unfriendly or unfamiliar policy landscape

The best laid plans can be blocked or undermined, or can fail to reach scale, in an unsupportive public policy environment. Consider these approaches:

- **Work across the aisle**—Establish relationships with public sector actors across political parties; don't treat them like the opposition, but as potential collaborators.
- **Use data and evidence**—Invest in the collection and effective presentation of good data to increase understanding of issues and potential solutions.
- **Focus on local/state vs. national**—In today's political environment, many funders find it more productive to work with local, county, or state officials than those at the federal level.
- **Hire staff with policy experience**—If you are moving into policy work for the first time, your current staff may not have the requisite experience.



Stepping back to assess your findings and integrate them into your work is essential, yet it can be both challenging and time-consuming. Low scores here could reflect an underdeveloped evaluation system, a siloed process, or an unwillingness to adapt. Here are examples of how others have overcome these obstacles.

Upgrade your evaluation system

If you are struggling to articulate your impact, you may need a more robust evaluation system to help you measure and understand it. Try these approaches:

- **Set and maintain appropriate evaluation practices**—Consistently evaluating the grants you make is not as difficult as it might seem. Nonprofits are used to providing reports to funders detailing how they used the funds, but funders do not always ask for the right information. Align your evaluation with your strategic goals, collect quantitative and qualitative data that demonstrate progress toward those goals, and collect information in a consistent and timely manner. When developing your evaluation practices, remember to consider your counterfactual. In other words, what would have happened without this grant or program?
- **Move beyond individual grant evaluations to program area assessments**—Once you build out a robust evaluation system, it becomes easier to evaluate your grant program as a whole. By routinely collecting quantitative and qualitative data, you can more easily aggregate that information to tell the whole story of your funding. Build in time to review this story and determine if your investments are moving the needle.

Use what you learn

Funders with strong evaluation programs don't always use their data to inform their grantmaking. Overcome this obstacle with these tactics:

- **Document and discuss achievements and challenges**—Key decision makers don't always have time to evaluate every grant, and staff are often subconsciously incentivized to find successful projects to highlight. But looking at what didn't work can prevent funders from repeating mistakes, and can help you better support your nonprofit partners going forward.
- **Invest time at board meetings to discuss evaluations**—Most boards spend the majority of their time discussing which projects or programs to fund, and they spend very little time evaluating past grants. Encourage your decision makers to discuss both equally.
- **Hire independent consultants**—Sometimes key decision makers or staff do not have the time or proper vantage point to see silos within an organization. Hiring an independent consultant to examine your grantmaking practices and evaluation systems can provide an unbiased assessment of any information silos.

Adapt

Significant time and effort go into developing a strategy, so decision makers can sometimes be hesitant to change their practices. Yet your evaluation results, feedback from grantees, or other external factors might make a change in strategy necessary for success. Here are some ways to maintain your flexibility:

- **Set a schedule for strategic planning**—Strategic plans are great for providing direction, but they are not evergreen. The best plans are only effective for a three- to five-year period, and a poorly developed plan might not even last one year. Key decision makers should routinely develop strategic plans, build in time to evaluate their progress toward their strategic goals, and determine when it is time to develop a new strategic plan.
- **Evaluate your strategy, not just your grants**—Many funders invest resources in evaluating grantees, but far fewer funders evaluate themselves. Does your strategy still match your internal priorities? Does it still align with your external environment? What are your partners and grantees saying about the effectiveness of your strategy? Asking questions like these at routine intervals can keep your strategy relevant and help you know when it is time to rethink your approach.



Taking a Systems Change Approach

Promising strategies: set bigger, measurable goals; sync your staffing model; find and nurture opportunities for collaboration

The Melville Charitable Trust has been funding in the area of homelessness for nearly 25 years, with a primary focus on Connecticut and on national policy. When its new executive director arrived six years ago, she embarked on a 12-month planning process. The board and three-person staff dove deep into understanding the key trends affecting homelessness by learning from experts, other funders, and grantees. They emerged with consensus to adopt a more focused approach to supporting systems change, which included investing in more work to prevent homelessness, test new strategies, and ensure solutions were delivered effectively. Although the trust would continue to use Connecticut as a geographic locus, it decided to take a more active role in influencing national dialogue.

Staff capacity was an early obstacle. One staff member was spending considerable time stewarding a mixed-use, 120-unit housing development they had funded years earlier. The solution came in the recruitment of a new partner to manage the operation and a refinancing that freed the trust from ownership. In addition, as the board began to recognize the new strategy's staffing needs, it authorized funds that allowed the hiring of two additional program officers and a communications manager.

The trust is a founding member of Funders Together to End Homelessness, a national funder network, but it knew the new strategy would require even more collaboration across sectors. The staff experimented with different models of collaboration—sometimes funding a lead organization, sometimes taking the lead, and sometimes stepping in to facilitate. Collaboration with other funders has generally worked well by building a structure that allows others to plug in easily. Staff do find they sometimes have to adjust their expectations to accommodate the different pace at which other funders make decisions. Supporting collaboration at the grantee level has not always been easy in the face of differing agendas, as well as intermittent turf issues among partnering agencies. On occasion, trust staff have stepped in to assist agencies in defining common goals and respective roles for moving forward.

As the trust has become more intentional about its strategies—professionalizing its work, hiring more staff and consultants, and developing deep content expertise—it has become harder for the board to engage and fully understand the issues. In response, the trust recently adopted a consent agenda at board meetings, which has freed up time for the board to actively engage in learning and strategy discussions.

Staff and board members knew from the start that systems change is complex, takes time, and requires patience and ingenuity. They are well on their way.



When Evaluation Is Not Enough

Promising strategies: focus your giving, sync your evaluation system, adapt

The Suder Foundation is a private, operating foundation based in Texas with one full-time staff and three board members. It focuses on promoting college success for first-generation students through targeted grants to universities to better support the students participating in its holistic First Scholars ® program.

The foundation placed an early emphasis on collecting the data necessary to track the success of its programs at both the student and institutional levels. It works with universities to collect aggregated and anonymized student-level data (e.g., retention rates, grade point averages, graduation rates) as well as factors that may signal a need for intervention (e.g., course completion, number of credits earned per year). The foundation also tracks qualitative indicators of participants' benefit from the holistic programming approach.

The foundation also asks for data about other first-generation students at the university, and the student body as a whole, so it has multiple points for comparison. It looks for qualitative changes to the universities too, such as the creation of offices to support first-generation students and other indicators that suggest an institutional change in culture.

Although the Suder Foundation sees quantitative and qualitative improvements as the result of its funding and programming, it still struggles with some external factors. For example, leadership changes at universities made it difficult to sustain programming on certain campuses.

By continually analyzing its data and re-evaluating its strategy, the foundation continues to move the needle. After realizing the issue of program sustainability, the Suder Foundation added new tactics to its funding toolkit. It also partnered with NASPA (Student Affairs Administrators in Higher Education) to co-found the Center for First-Generation Student Success, aimed at driving higher education innovation and advocacy for first-generation students.

The Suder Foundation's use of continual evaluation and self-reflection is keeping it on the path to the long-term impact it seeks.



Starting With a Strategy

Promising strategies: secure sufficient expertise, address nonprofit capacity, use what you learn

Cullen Foundation is an independent private foundation based in Buffalo, NY. It recently ramped up its grantmaking and focus on impact following a large influx of assets upon its founder's death. This prompted the Cullen Foundation's Trustees to hire full-time staff and prioritize the creation of a strategic plan to guide the foundation's expansion.

The inaugural strategic plan called for the foundation to distribute about 80% of its funds and effort toward PreK-12 education, with the other 20% to performing arts. Its president came from a performing arts background, so when hiring new staff members, she emphasized hiring staff with direct field experience in education to balance the staff's capacity. By hiring staff with this expertise, the foundation positioned itself for stronger working relationships with local schools and the nonprofits working to improve education outcomes for Buffalo's most economically disadvantaged students.

The foundation commenced additional strategic planning in its education area where it defined long-term goals (improving PreK-12 education in Erie County) and medium-term objectives (adding 3,500 high-quality school seats to the Buffalo school system over the next 10 years). As a result, the foundation invests in both strategic grants that can help create systems change (bringing City Year to Buffalo to build the capacity of local schools) and grants to high-performing nonprofits to improve students' education outcomes.

In addition, thanks in part to the board's emphasis on a learning mindset, the Cullen Foundation has seen early success in its ability to collect local education data and use it to inform its grantmaking.

Cullen Foundation has a strong strategic plan, investment plans specific to key areas of focus (charter schools; human capital; and soon performing arts), a board that is committed to impact and evaluation, and staff in place that can take action. All these factors have allowed the Cullen Foundation to overcome many early obstacles to high impact.

1. The Cullen Foundation defines a high-quality seat by comparing a school's standardized test score to the New York State average. If a school is above that average, they define the seats in that school as high quality.



Now it is time to consider your next steps. Given the results of your self-diagnostic, what obstacles do you expect to encounter at each stage? Which strategies might you use to address them? What steps will you take to put these strategies into place?

STAGE	YOUR OBSTACLES	YOUR STRATEGIES	YOUR NEXT STEPS
Dynamics & Readiness			
Planning & Focus			
Capacity & Implementation			
Context & Collaboration			
Learning & Adaptation			



Available at www.exponentphilanthropy.org unless otherwise noted

PRE-READING

10-Minute Impact Assessment: Use this simple framework to discuss your impact, identify areas of strength, and highlight opportunities for improvement.

Getting to Impact Through Planning: Get advice on a thoughtful planning process that answers two important questions: What do we want to accomplish with our limited resources, and what is the best way to do so?

Ramping Up Your Foundation: Get help to thoughtfully and responsibly plan for a significant ramp up in giving and/or adjust to a sudden infusion of assets.

Strategic Philanthropy: A Primer on Roles and Strategies: Find suggestions for moving from check writing to high-impact philanthropy and examples of donor efforts to move toward more strategic giving. www.tpi.org

DYNAMICS & READINESS

6 Ways to Champion Change From the Inside Out: Do you want to catalyze change at your foundation? Explore how trustees and staff champion change successfully from the inside out.

Assessing Your Board: Self-assessment is an excellent choice for boards at every stage, whether you are new to grantmaking or have years of experience.

Strategies for Educating and Developing Your Board: Educating and developing board members can be a challenge for even the most well-intentioned foundations.

PLANNING & FOCUS

Choosing a Focus: What do you want to achieve with your foundation? Taking time to focus can help you clarify what you want to achieve and move closer to your goals.

Five Barriers to Focus and Ways to Push Past Them: We hear from funders that choosing a focus—for all or part of your giving—is the most fundamental step on a journey toward fulfilling philanthropy.

CAPACITY & IMPLEMENTATION

Foundation Consultants: An Industry Overview: Among consultants to foundations, there is broad variety in types of services, types of consultants, and fees/fee structures—all addressed in this article.

Hiring Great Staff: Find an overview of issues a foundation should weigh at each step of the hiring process.

CONTEXT & COLLABORATION

Donor Collaboration: Power In Numbers: Review various forms of collaboration and consider whether they might be right for you. www.tpi.org

Funding and Engaging in Advocacy: Opportunities for Small Staffed-Foundations: Learn about the wide “comfort zone” for funding advocacy activities, engaging in advocacy yourself, and talking about advocacy with grantees and grantseekers.

LEARNING & ADAPTATION

Adopting a Learning Mindset: The best way to make smarter philanthropic investments over time is to generate good information about what’s working, what’s not working, and why. What, though, does it take to adopt a learning mindset?

Making a Difference: Evaluating Your Philanthropy: Measuring the results of a charitable effort can be difficult. Learn about simple, pragmatic approaches to evaluation. www.tpi.org

Using Evaluation to Become an Effective Learning Organization: Just because evaluation has been overwhelming or unproductive in the past doesn’t mean it has to be going forward.

About Exponent Philanthropy

Exponent Philanthropy is the country's largest association of funders and the only one dedicated to serving foundations with few or no staff, philanthropic families, and individual donors. Our vibrant network has in common lean operations and a style of philanthropy motivated by personal passion, community needs, and the strong desire for better outcomes. We provide high-quality and cost-effective programs, resources, and connections that maximize our members' dollars and time for the benefit of diverse communities and causes. www.exponentphilanthropy.org

About The Philanthropic Initiative

The Philanthropic Initiative (TPI) is a strategic philanthropy advisory practice that helps individuals, families, foundations, and companies increase the impact of their giving. Working around the globe, we partner with clients to create, implement, and evaluate customized philanthropic strategies. We fuel the growth of high-impact philanthropy around the world through philanthropic consulting work as well as cutting-edge research, philanthropic education programs, and initiatives with key allies. Since 1989, we have worked directly with hundreds of clients, serving as consultants and thought partners to ambitious donors and foundations that embrace innovative thinking in their efforts to find levers of change. TPI operates nationally and globally, and is housed at the Boston Foundation. www.tpi.org

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