

DISCUSSION QUESTIONS:

What do the roles cards you chose tell you about who you are and what you do?

1. Do your “core” and “adjacent” roles fit together in a coherent way?
2. Are there 1-2 roles that serve as the “center” for what you do?
3. Are the roles you selected well aligned with your vision, mission, and goals?
4. Are your activities, capabilities and systems well aligned with the roles you’ve chosen?
5. What do the “out of bounds” roles tell you about your organization?
6. How well aligned would your board and/or staff be about the roles they would choose?

How does this “strategic portfolio” match up with your actual resource allocation?

7. What proportion of your time and money do you spend on each part of your portfolio (core, adjacent, and aspirational)?
8. Are your resources concentrated on your core or are they spread across a range of activities?
9. Are you dedicating enough resources to experimenting with new roles and activities?

This exercise is part of the *What’s Next for Community Philanthropy* initiative. For more information, visit monitorinstitute.com/communityphilanthropy.

**WHAT’S NEXT *for*
COMMUNITY
PHILANTHROPY**

Prioritizing Roles

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—ADVOCATING—
Lobbying for
policy change

—ADVOCATING—
Influencing
government and
business priorities

—BUILDING COMMUNITY CAPACITY—
Providing direct
support to local
government

—ADVOCATING—
Influencing public
opinion

—ADVOCATING—
Promoting specific
organizations
and interventions

—BUILDING COMMUNITY CAPACITY—
Growing local
entrepreneurs and
businesses

—BUILDING COMMUNITY CAPACITY—
Promoting nonprofit
organizational
effectiveness

INSTRUCTIONS:

1. Flip through the deck and quickly place each card into one of four piles:
CORE: This is what we're all about!
ADJACENT: It's important, but not central
ASPIRATIONAL: It'll be important for us to do, or do more of, in the future
OUT OF BOUNDS: It's not what we're about
2. Look through your "core" pile and choose the five most critical roles. Move unselected cards to the "adjacent" pile.
3. Look through your "adjacent" pile and choose the next five most important roles for your organization.
4. Look through your "aspirational" pile and choose the five roles that will be most important for you to do more of in the future.
5. Look at your "out-of-bounds" pile and choose (up to) five that you feel most certain you should *NOT* take on.
6. Make note of the roles you have chosen. This is your "Strategic Portfolio." With these roles in mind, reflect on the discussion questions on the other side of this card.

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—BUILDING COMMUNITY CAPACITY—

Developing the skills
of local residents

—ENGAGING THE COMMUNITY—

Empowering resident
decision-making

—ENGAGING THE COMMUNITY—

Mobilizing
residents
around issues

—ENGAGING THE COMMUNITY—

Providing avenues
for community
input, ideas and
connection

—ENGAGING THE COMMUNITY—

Facilitating civic
participation and
volunteerism

—ENGAGING THE COMMUNITY—

Facilitating
community
dialogue

—ENGAGING THE COMMUNITY—

Strengthening
social connections
among residents

—COMMUNITY PLANNING—

Proactively planning
for the long term

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—COMMUNITY PLANNING—

Facilitating urban/
rural planning
processes

—COMMUNITY PLANNING—

Promoting
economic
development
planning

—COMMUNITY PLANNING—

Planning for
disaster response
and prevention

—EXPANDING FINANCIAL CAPITAL—

Soliciting giving
from local donors
(individual
or institutional)

—EXPANDING FINANCIAL CAPITAL—

Soliciting capital
from outside
the community

—EXPANDING FINANCIAL CAPITAL—

Deliberately attracting
diverse donors

—EXPANDING FINANCIAL CAPITAL—

Educating the public
about philanthropy

—EXPANDING FINANCIAL CAPITAL—

Developing
earned income
to support
social-purpose
activities

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—ALIGNING ACTION—

Facilitating learning
networks

—ALIGNING ACTION—

Managing formal
collaborations

—ALIGNING ACTION—

Coordinating
funding and activities

—ALIGNING ACTION—

Building
collaboratives

—DIRECT SERVICE & PROGRAMMING—

Incubating
social enterprises
or businesses

—DIRECT SERVICE & PROGRAMMING—

Starting new
nonprofit programs

—DIRECT SERVICE & PROGRAMMING—

Managing
direct service
programs

—DIRECT SERVICE & PROGRAMMING—

Designing
government
interventions

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—DIRECT SERVICE & PROGRAMMING—

Managing
government
programs

—DEPLOYING FINANCIAL CAPITAL—

Impact
investing

—DEPLOYING FINANCIAL CAPITAL—

Supporting
individuals
(scholarships,
fellowships, etc.)

—DEPLOYING FINANCIAL CAPITAL—

Grantmaking
to nonprofits

—DEPLOYING FINANCIAL CAPITAL—

Directly connecting
givers and recipients

—FINANCIAL & DONOR SERVICES—

Managing transactions
for donors

—FINANCIAL & DONOR SERVICES—

Educating donors
about community
issues

—FINANCIAL & DONOR SERVICES—

Managing
investments/
endowment funds

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—FINANCIAL & DONOR SERVICES—

Providing
philanthropic
advisory services

—FINANCIAL & DONOR SERVICES—

Connecting local
philanthropists
with each other

—FINANCIAL & DONOR SERVICES—

Co-creating
initiatives
with donors

—SHARING COMMUNITY INFORMATION—

Tracking data
about
community
well-being

—SHARING COMMUNITY INFORMATION—

Compiling
information about local
organizations and
available resources

—SHARING COMMUNITY INFORMATION—

Researching
community
issues and
public policy

—SHARING COMMUNITY INFORMATION—

Measuring
the outcomes
and impacts
of programs

—SHARING COMMUNITY INFORMATION—

Spreading
local news