

# WHAT'S NEXT *for* COMMUNITY PHILANTHROPY



## **BRIGHT SPOTS:** Promising approaches in community philanthropy

JUNE 2014

# How to use this document

This document is meant to help community philanthropy leaders get a sense of — and take inspiration from — the wide range of approaches used by others outside of their organizations, their local areas, and even their field. It features 70 examples of promising programs and approaches inside and outside community philanthropy — what Chip and Dan Heath (the authors of *Switch: How to Change Things When Change Is Hard*) refer to as “bright spots.” In some cases, these bright spots could be copied directly or adapted for use in new places or circumstances. In others, they may provide the seeds of new ideas that could be tested and tried in other communities. Other bright spots may simply serve as inspiration to help community philanthropy organizations recognize the wide range of approaches that could be pursued to serve local constituents.

The bright spots in this document are organized across a broad set of “roles” that community philanthropy organizations can play in their communities. The diagram below, which outlines clusters of roles that have been identified by the *What’s Next for Community Philanthropy* research team, is designed to help you quickly identify the content that is most relevant to your organization. While the document is intended to be consumed in pieces (each cluster of roles comprises a stand-alone two-page spread), the overview can serve as a useful explanation of the rationale and process for exploring and using bright spots to stimulate innovation and new thinking.

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### Ten clusters of roles in community philanthropy



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# Overview

## **The innovation process often begins with looking at what's already happening in other places.**

Larry Keeley, cofounder of the innovation strategy firm Doblin, once remarked that the best way to start thinking about innovation is to look for areas where it is already happening. As science fiction author William Gibson famously put it, "The future is already here — it's just not evenly distributed."

It's important to remember that innovative ideas don't have to be completely original and brand new — they just need to be *new to you*. The seeds of innovation often come from taking inspiration from existing approaches and translating their underlying ideas to new circumstances or contexts.

## **Innovation in community philanthropy can be found everywhere.**

There is a great deal of inspiration to draw from emerging approaches that are spreading throughout community philanthropy. Community philanthropy organizations today are adapting to changing times and responding to the evolving needs of their constituencies and communities by doing far more than just serving donors and giving grants. In some cases, they're tracking community-wide indicators and using the data to inform decision makers and public policy. Others are experimenting with impact investments to local businesses and launching worker-owned businesses that promote local economic development. And still others are empowering residents to get involved in creating and executing community improvement plans. The list of promising new approaches goes on and on.

And there are even more ideas for community philanthropy organizations to discover when they broaden their field of vision. Too often, community-based organizations look only to their most immediate peers for ideas: small organizations look at other small organizations, big organizations at other big organizations, community foundations at other community foundations, and local United Ways at other local United Ways. Although it may require time and effort to translate the kernels of an idea from one type of organization to another, there is a wealth of lessons and ideas that can be drawn from looking across these traditional boundaries.

Much can also be learned from looking at "analogous spaces" — other types of community philanthropy organizations and parallels in other industries and sectors. Businesses, government agencies, private foundations, community development finance institutions, advocacy organizations, civic clubs, and others in these spaces are often effectively using and/or pioneering strategies that could provide important inspiration and ideas to help community philanthropy organizations better serve their constituencies. While it's not wise to duplicate the successful efforts of others in your community, there's nothing wrong with copying others (or adapting their approaches) to improve the way your organization functions and to fill unmet community needs.

## **This document aims to help you see and find inspiration in the bright spots that have emerged within and beyond your field.**

It's often difficult for community philanthropy leaders to step back from the crush of day-to-day responsibilities to look around at what others in the field are doing, nationally and globally. And it's even harder to get a good perspective on lessons from analogous spaces outside of their industry.

This document highlights a sampling of the bright spots that surfaced over the course of the yearlong *What's Next for Community Philanthropy* initiative. We identified bright spots through our interviews with nearly 200 different community philanthropy organizations and our exploration of more than 50 different analogous spaces.

We have shared them here, organized into 10 clusters, each of which represents a set of roles that community philanthropy organizations can play in their communities.<sup>1</sup> For each cluster, we provide a description of the related roles, highlight a number of bright spots from community foundations and other types of organizations, and then propose a handful of potential ideas for action that could be tried at your organization. It is worth noting that the document begins with community foundations as a starting point, but most of the lessons are equally applicable to community philanthropy organizations of any sort.

We hope that this document helps expand your view of what's possible for your organization and inspires you to experiment with new approaches for serving your community in ways that build on your organization's unique mission, capabilities, resources, and context. We also hope that it spurs you to more routinely scan the field in search of inspiration and provides you with a template for how you might connect the dots between the stories you hear and your own organization.

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<sup>1</sup> See the glossary at the end of this piece for a full list of roles. The list was derived from interviews with nearly 200 community philanthropy leaders, and while it is not mutually exclusive or collectively exhaustive, it has been tested numerous times in the field, including at the 2013 Council on Foundations Conference for Community Foundations in San Diego, the 2013 Large Community Foundations Conference in Austin, and the 2013 Community Foundations of Canada CEO Retreat in Banff.

**It is equally important to understand what this document is *not*:**

- This catalog is not a comprehensive or even a representative look at everything now happening in the field. There is far more innovation going on in community philanthropy than anyone could capture in a single resource. This document simply aims to give a glimpse of the diversity of approaches now being taken by organizations of varying types, sizes, and geographies. There are a number of other good sources for those interested in learning about additional bright spots in the field, such as the recent *Here for Good: Community Foundations and the Challenges of the 21st Century* anthology, the [Community Foundation Standards](#) website, the Federal Reserve Bank of San Francisco's [What Works](#) blog, and [Knight Community Information Resources](#) online portal.
- We don't claim that the examples cited here are the brightest or most innovative experiments now occurring in the field. Doing so would be an impossibly difficult and subjective task. Some of the examples we cite are "way out there" and push the boundaries of the field, while others are more modest, closer to the traditional roles played by community philanthropy organizations. As such, for any given example highlighted here, we are certain that there are many other cases of organizations doing similar things and, in many instances, even more innovative things. As much as possible, we have tried to represent the work of a wide range of organizations, so don't be surprised if the instance cited in this piece isn't the one you would associate with a specific activity.
- This document is not a set of recommendations about activities that you should adopt. The piece provides a wide range of ideas you could think about for your community, but each idea should be considered in the context of the unique circumstances, mission, capabilities, and resources of your organization. We hope that at least some of the ideas will make sense for you or will spark new thinking. But it's important to recognize that many of the ideas mentioned may not be a great fit for you and your organization.
- This document is not intended to be a how-to guide for new approaches. We could probably write an entire report on how to design and execute any one of the ideas collected here. Instead, it provides a high-level view of the activity now going on in the field.

This document is part of the *What's Next for Community Philanthropy* toolkit, which was published by Monitor Institute in June 2014 with support from the Council on Foundations, the Charles Stewart Mott Foundation, the W.K. Kellogg Foundation, and Community Foundations of Canada, along with more than 15 North American community foundations.

The *What's Next* toolkit aims to help community philanthropy organizations apply innovation and design methodologies to think creatively about their business models and the broader future of the field. The research for this toolkit involved nearly 200 interviews with leaders of community foundations and other community philanthropy organizations, as well as more than a dozen interactive workshops and user feedback sessions.

Visit [monitorinstitute.com/communityphilanthropy](http://monitorinstitute.com/communityphilanthropy) to learn more about the *What's Next* toolkit and research methods.

# EXPANDING FINANCIAL CAPITAL



*Increasing the assets available to support community change efforts*

Many community philanthropy organizations expand the financial capital available to their community by soliciting tax deductible gifts and funds from wealthier individuals. While some remain hyperfocused on this segment of the population — and particular on baby boomers, who are expected to transfer trillions to their families and favorite causes over the coming decades — others are becoming more diversified in their donor development efforts. These organizations are engaging emerging donors of different races and ethnicities, genders, and sexual orientations; designing large-scale fund-raisers that enable thousands of residents to give small-scale gifts; and reaching out to individuals, businesses, private foundations, and the federal government alike. Some of these organizations are also expanding financial capital by collecting different classes of assets (rather than just financial capital) and by turning alternative assets (e.g., real estate and water rights) into ongoing sources of revenue for their operations.

**Roles that fall in this cluster include** educating the public about philanthropy, soliciting giving from local donors, soliciting capital from outside the community, deliberately attracting diverse, and developing earned income to support social-purpose activities.

## Bright spots from community foundation

*Promising approaches from the field*



### Soliciting capital from outside the community... What if you helped local organizations tap federal and state funding?

The Foundation for the Mid South is constantly looking for philanthropic and public dollars to bring into its tri-state region. After the recession, for example, the Foundation initiated a conversation with the three state health departments — in Arkansas, Louisiana, and Mississippi — about ways to secure stimulus funding for nurse family partnerships. In effect, the Foundation invested \$30,000 to hire grant writers, who in turn helped the health departments secure \$30 million in federal funding. All in all, the Foundation's support affected the lives of more than 25,000 families in the region.

### Developing earned income to support social-purpose activities... What if you held on to revenue-generating alternative assets?

Pikes Peak Community Foundation in Colorado generates revenue from its cell phone towers, water rights, real estate, and working farms in order to cover its operating expenses. It does this because of the position its board has taken against competing with local nonprofits for fundraising. One of the Foundation's ventures, **Venetucci Farm**, sells organic products and offers educational activities. The Foundation had solicited the Venetucci family to bequest the nonworking farm to fix, find a family to care for it, and create a collaborative undergrad and graduate internships program with the local university to support the farm's programming efforts.

### Soliciting giving from local donors... What if you attracted potential donors through nontraditional channels?

The Bucharest Community Foundation in Romania has designed several outreach programs to connect with young donors at major life events. For instance, the Foundation has worked with wedding planners to help philanthropically minded couples, along with their guests, use their wedding gifts to start a fund for the community. Birthday parties are also popular venues for community philanthropy in Bucharest, with one dance party serving as a catalyst to create an arts and culture fund for the Roma community. By reaching out to a younger population and using philanthropy to celebrate, the Foundation engages the community to give in new ways.

### Educating the public about philanthropy... What if you worked with others to encourage local giving?

In the wake of a survey in 2014 that showed public awareness of community foundations was less than 10 percent, community foundations across Canada teamed up to run a national, multimedia ad campaign that promotes the community foundation brand. The movement's national network — Community Foundations of Canada (CFC) — organized the campaign, which is broadcasting on national **radio**, **TV**, and **social media**. Although CFC created customized local print ads for individual community foundations, all ads feature the sign-off, "Brought to you by the 191 Community Foundations across Canada. Find yours at [communityfoundations.ca](http://communityfoundations.ca)."

### Deliberately attracting diverse donors... What if you solicited small gifts from less affluent individuals?

The Community Foundation of Greater Memphis in Mississippi developed a program that enables residents to give as little as \$1 per day. Members of the program, which is called **GIVE 365**, pool their daily dollars together, choose an annual theme to guide their grantmaking, and collectively decide which organizations will receive the money after researching the applicant organizations and hearing three-minute presentations at a finalist event. GIVE 365 members have awarded nearly \$225,000 over the past four years to Memphis and Shelby Counties' nonprofits.



# Inspiration from analogous spaces

Approaches from other types of organizations and industries

## Soliciting capital from outside of the community... What if you encouraged revenue-generating businesses to set up shop in your community?

Asheville Chamber of Commerce's Economic Development Coalition plays an active role in attracting businesses to their community. The chamber produces marketing and statistical materials and sends representatives to industry trade shows nationwide. It also manages the pipeline of potential companies to attract to the community and invests in relationships with prospective companies. Partly as a result, *Forbes* named Asheville as one of the top 10 places to do business in 2013.

## Developing earned income to support social-purpose activities... What if you found a way to generate revenue to cover programmatic costs?

**Hot Bread Kitchen** increases the economic security of low-income and immigrant women in New York City through a yearlong culinary training program. Hot Bread Kitchen offers participants English as a Second Language courses and professional development opportunities while teaching participants how to bake native breads from scratch. Hot Bread Kitchen offsets these training costs by selling the multiethnic breads baked by the women. After the women graduate from their yearlong rotation, Hot Bread Kitchen helps place them in local bakeries so they can continue to build their culinary skills and maintain their economic stability.



## Ideas for taking action

*A sampling of approaches to consider*

### Lower intensity

- Have an explicit conversation with your board about its assistance with donor development.  
*Who among their social and professional networks might the organization want to develop as donors in the near future?*
- Create an internship position for college students who want to build out their marketing and social media résumés, and have them revamp your online presence to appeal to millennial donors.

### Medium intensity

- Deliberately expand your donor development channels beyond the usual suspects to include wedding planners, real estate agents, and funeral directors. Think about what you could offer them in return.
- Partner with an existing crowdfunding platform like **Razoo** to create a local version of the site in order to enable residents to pool small contributions in support of the local nonprofits and civic projects of their choice.
- Work with local schools, colleges, and youth groups to incorporate strategic philanthropy and social innovation into their curriculum and to allow students to have decision-making authority over a small amount of discretionary funding (subject to final approval).

### High intensity

- Cosponsor a local giving day and support it by raising matching funds from your donors. Refer to the **Giving Day Playbook**, created by the Knight Foundation, for guidance.
- Seek an alternative donated asset (e.g., agricultural land, cell phone towers, or even entire businesses) that could generate an ongoing stream of additional revenue for your organization.

### Imagine: What if your organization...

- ...became a hub for the sharing economy in your community, helping identify underutilized resources and opportunistically linking individuals and organizations with excess assets like empty office spaces, vacant lots, and old equipment?
- ...took a cue from **Community Profits Montgomery** and accredited local businesses that gave a small percentage of their profits back to the community?

*What ideas come to mind for your organization?*

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# DEPLOYING FINANCIAL CAPITAL



Using monetary assets to support organizations, programs, and people

Historically, philanthropic organizations deployed money in just a few ways — most often as grants to support the programs of local nonprofit organizations or as educational scholarships for young adults. Over the last few decades, however, funders have begun to pioneer new and hybrid approaches for deploying financial capital. For example, the organizational effectiveness movement brought an emphasis on general operating support for nonprofit organizations, while the more recent networks movement has highlighted the importance of supporting coordinated cohorts of organizations. Meanwhile, the growth of the impact investing field has popularized a **mission-related investment continuum** that includes grants, loans, and equity investments and has helped funders consider how they can use all of their assets for mission-related purposes, rather than just the 5 percent required by law. And a whole host of philanthropic organizations are beginning to experiment with prizes, challenges, and competitions as a way to source innovative solutions to pervasive social problems. While most community philanthropy organizations still consider grantmaking to be the core role they play, many are experimenting with these and other ways to deploy their financial capital for social and environmental good.

**Roles that fall in this cluster include** grantmaking to nonprofits, supporting individuals, directly connecting givers and recipients, and impact investing (including program- and mission-related investing).

## Bright spots from community foundation

Promising approaches from the field



### Grantmaking to nonprofits... What if you specifically tried to spur innovative new solutions to community challenges?

Over the last five years, Minnesota Community Foundation has given away \$5,000 to \$1 million grants as prizes to the nonprofit winners of an annual competition. The **Minnesota Idea Open Challenge** engages individuals and organizations in community problem-solving on a variety of issues, e.g., obesity, water, and cross-cultural understanding. A committee of volunteers selects the most promising ideas, and residents vote on the winning idea. The process takes place on a user-friendly website made possible by Knight Foundation and Ashoka Changemakers, which has experience running major international competitions.

### Supporting individuals... What if you bet on individual — rather than organizational — changemakers in your community?

The Rhode Island Foundation supports individuals who have a big idea for improving life in the state. The **Rhode Island Innovation Fellowship** program, which is sponsored by two local donors, provides two individuals with up to \$300,000 over three years to develop, test, and implement their innovative idea. A panel of seven cross-sector leaders evaluates ideas each year, based on criteria such as the creativity of the proposed solution, the passion of the applicant, potential social economic impact, and the robustness of the implementation plan. Since 2012, fellows have chosen to tackle issues as diverse as Hepatitis C, retail store failure, and the new food economy.

### Impact investing... What if you made loans to projects that could improve the quality of life in your community?

The Edmonton Community Foundation in Canada cocreated an organization that provides loan capital to social entrepreneurs. The organization, called the **Social Enterprise Fund**, was created in partnership with the City of Edmonton with financial contributions from the United Way and other private funders. To date, the Fund has invested more than \$13 million in approximately 30 projects in sectors ranging from food security and social housing to culture and the environment.

### Directly connecting givers and recipients... What if you made it easy for local entrepreneurs to raise funds?

Southwest Initiative Foundation, a regional community foundation in rural Minnesota, is enabling local entrepreneurs to get zero-interest loans directly from a global community of lenders. More specifically, the Foundation has partnered with Kiva (a global nonprofit crowdfunding site) to launch **Kiva Zip** (which enables people anywhere in the world to make loans as small as \$5 to entrepreneurs in Kenya and the United States) and is serving as a trustee that publically endorses local businesses deserving of loans. In the first year, the Foundation endorsed three small business loans totaling \$10,000, with a repayment rate of 100 percent (the national repayment rate is 87 percent).

### Impact investing... What if you enabled your donors to invest in businesses that produce social and environmental as well as financial returns?

The Seattle Foundation enables its donors to invest for impact through its **Mission Investment Program**. Although the Foundation does source impact investment deals, it does not act as a sole channel of investment options. Instead, it leverages outside investment managers — and its own donor base — to make more impact investment options available. For example, donors can invest in **Community Capital Management, Inc.**, which invests in high-grade, fixed income bonds focused on community and economic development. Donors can also use their donor-advised funds to invest in independently sourced opportunities.



# Inspiration from analogous spaces

Approaches from other types of organizations and industries

## Supporting individuals... What if you invested in high-potential social entrepreneurs?

Echoing Green is a global nonprofit that operates several fellowships programs for social entrepreneurs who are working to disrupt the status quo in any part of the world. Its two-year fellowships offer up to \$90,000 in seed-stage funding, as well as health insurance, a yearly professional development stipend, networking gatherings, access to technical support, and access to a growing community of like-minded individuals. Since its founding in 1987, Echoing Green has provided more than \$33 million to nearly 600 emerging social entrepreneurs working in more than 40 countries around the world.

## Impact investing... What if you invested all or most of the assets under your management for impact?

Today, the F.B. Heron Foundation is working to invest 100 percent of its \$274 million endowment in ventures that help further its mission to expand employment and economic opportunity for those in need. To do this, the Foundation merged its grantmaking and investing functions into a single office that explores, vets, and invests in nonprofits, social enterprises, and for-profit businesses. The Foundation's investments range from grant support and subordinate loans to guarantees and private equity — and a single organization may receive more than one type of investment (e.g., a nonprofit called The Reinvestment Fund received grants to set up its information system and a \$500,000 loan for its business loan program).



## Ideas for taking action

A sampling of approaches to consider

### Lower intensity

- Consider giving out one or a handful of multiyear grants to your most promising grantees in order to help them plan for the long term.
- Closely examine the investment portfolio of your endowment. *Are your investments aligned with or counter to your mission?* Use your findings to start an investment-strategy conversation with your board.
- Engage in events and networks (e.g., [Mission Investors Exchange](#), [SOCAP](#), [GIIN](#)) that focus on impact investing in order to connect with and learn from others who are using markets for social impact.

### Medium intensity

- Make the grant deployment process smoother by streamlining the grant application process and enabling grantees to both schedule appointments with program officers and check the status of their application online.
- Take a cue from the [MacArthur "Genius Grant"](#) by investing in promising changemakers in your community and providing them with a grant to pursue their creative ideas for one or several years.
- Energize residents with an innovation challenge focused around a pervasive issue in your community (e.g., poverty, pollution, obesity), and provide grants and other funding opportunities to the winners.

### High intensity

- Learn from the efforts of place-based funders like [The California Endowment](#), which are helping to fund demonstration projects that are laying the groundwork for social impact bonds in their communities.
- Combine your grantmaking and endowment management staff into one capital deployment office that considers all of the financial tools in your toolkit for any organization you seek to help.

### Imagine: What if your organization...

- ...acted as an intermediary that coordinated with investors, direct service providers, and your local government to launch a [social impact \(or pay-for-success\) bond](#) in your community?
- ...pooled resources from multiple funders (e.g., philanthropists, investors, corporations, government) into large funding sources that could help scale homegrown social programs and for-profit enterprises?
- ...offered to house and match an endowed social innovation fund created by your local government, similar to Alberta's [Social Innovation Endowment](#)?

What ideas come to mind for your organization?

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# FINANCIAL AND DONOR SERVICES



Providing financial and philanthropic assistance to individual and institutional donors

Community philanthropy organizations have traditionally managed the straightforward transfer of financial capital from wealthy donors to local nonprofits. Over the last few decades, however, changes in technology, the competitive landscape, and donor demographics and preferences have led to an explosion in the range of philanthropic products and services that are available to donors (read more about these trends in [Shift Happens: Understanding how the world is changing](#)). In response, a number of community philanthropy organizations have increased their capacity to manage philanthropic transactions that involve different asset classes (e.g., cash, equity, real estate); others have outsourced these services altogether. Some community philanthropy organizations are now providing a host of nontransactional donor services ranging from educational sessions and social events to customized philanthropic advisory services. And to varying degrees, many organizations are tailoring financial and donor services to the needs of new segments of their communities, including young professionals, people of color, middle-class and less-affluent donors, and even corporations and government agencies.

**Roles that fall in this cluster include** managing investments/endowment funds, managing transactions for donors, educating donors about community issues, connecting local philanthropists with each other, providing philanthropic advisory services, and co-creating initiatives with donors.

## Bright spots from community foundation

Promising approaches from the field



### Managing transactions for donors... What if you catered to the philanthropic needs of local businesses?

The Foundation For The Carolinas Center for Corporate Philanthropy created a donor services program that caters to local businesses. The program, called the Employee Disaster & Hardship Relief Funds, enables employees to contribute money for grants to coworkers who have been exposed to disaster or are undergoing personal hardship, boosting overall employee fellowship and morale. And it does this without requiring businesses to do any technical, legal, or due-diligence work themselves. The Foundation just formally launched a national expansion of this program called E4E Relief.

### Connecting philanthropists with each other... What if you served as a social club for donors?

The Fredericton Community Foundation of Atlantic Canada puts together an annual social event to connect its donors. The event, titled the Philanthropy in Action Dinner & Awards, recognizes philanthropists who have contributed to the community through personal giving, nonprofit leadership, and volunteering. The Foundation builds anticipation for the event by using social media, accepting nominations, and even soliciting sponsors via Twitter; and it injects fun into the event by recognizing recipients with a handcrafted award created by local artisans. More than 400 people attend the event, which has sold out every year since its inception in 2010.

### Co-creating initiatives with donors... What if you helped donors turn their passions into strategic initiatives?

California Community Foundation worked with an anonymous donor to launch an initiative that lies outside of the Foundation's own prioritized focus areas. The initiative, titled the [Iraq Afghanistan Deployment Impact Fund](#) (IADIF), addressed the needs of individuals and families recently affected by military deployment. At the donor's request, IADIF initially focused on direct service locally. Later, at the Foundation's recommendation, IADIF expanded in scope to include a grant to fund ["Invisible Wounds of War"](#) — a study that transformed the military's response to veterans' affairs nationally. Because it had no in-house expertise on veterans' affairs, the Foundation hired an outside expert to work on IADIF; because the issue was national, the Foundation worked with other community foundations and grantees nationwide.

### Providing philanthropic advisory services... What if you became a philanthropic advisory service for donors?

The Greater Houston Community Foundation in Texas offers philanthropic advisory and operational services to individuals, nonprofits, foundations, and businesses. Its philanthropic consultancy — which brings in 30 percent of its revenues — provides clients with tailored advice about the local philanthropic landscape and helps them set up specialized funds, manage grants, and convene strategic conversations. More recently, the Foundation created the [Next Gen Donor Institute](#), a yearlong program that helps donors learn about strategic philanthropy, reflect on their philanthropic journey, and learn from industry leaders about needs in their community.

### Educating donors about community issues... What if you connected donors to what's happening on the ground?

Fundación del Empresariado Sonorense, a community foundation in Mexico, is co-running daylong [immersion trips](#) across the Mexican border in close partnership with the U.S.-based nonprofit Border Community Alliance. More than 400 people have attended the monthly tours, the purpose of which is to provide a different view of the borderland through exposure to successful social and economic development programs as well as to local residents whose daily lives are affected by current immigration and national security policies in the borderland region. The program has thus far brought in more than \$100,000 in additional investment for the Foundation and its partners.



# Inspiration from analogous spaces

Approaches from other types of organizations and industries

## Connecting local philanthropists with each other... What if you provided opportunities for donors to volunteer their time together?

Social Venture Partners Seattle is a network of more than 500 diverse partners ranging from filmmakers to financial managers, nonprofit leaders to corporate veterans, and foundation executives to young philanthropists. Partners not only pool financial resources but also learn together through collective grantmaking, discussion groups, and workshops. They also volunteer their time and talent with local nonprofits, working shoulder-to-shoulder with these organizations to strengthen financial, management, communications, fund-raising, and other systems so they can make a greater impact.

## Managing transactions for donors... What if you provided seamless, low-touch tools that facilitated giving?

Fidelity Charitable recently created the **DAF Direct widget**, which makes it possible for donors to initiate grant recommendations from their donor-advised funds (DAFs) while still on nonprofits' websites. By adding the DAF Direct Web application to their website, nonprofits enable DAF donors to complete a grant recommendation in just a few clicks — simplifying giving in a way that can positively affect fundraising. For example, in 2013, 41 percent of the Fidelity Charitable grants to the Pan-Massachusetts Challenge (PMC) were recommended by donors who used the widget; overall, PMC raised 50 percent more than it did in its previous year.



## Ideas for taking action

A sampling of approaches to consider

### Lower intensity

- Survey the products and services available to donors in your community (e.g., endowment management, philanthropic advisory services, remittance giving channels), and have a conversation with your board about opportunities to fill gaps you identify in ways that raise revenues for your organization.
- Have a frank conversation with your board about what it means to be committed to excellence in donor service. *How willing are they to work on issues that are outside of or in opposition to your organization's discretionary programming?*
- Host a pop-up social event for your donors at the site of a high-performing nonprofit. Invest in making it a memorable experience for those who show up.

### Medium intensity

- Interview five donors or financial advisors who are not affiliated or engaged with your organization. Use the insights you gain about their aspirations, habits, and challenges to refresh your approach to donor service.
- Identify a disadvantaged area where one or more of your grantees is doing high-impact work. Produce a tour of the area that teaches community leaders and potential donors about its history, exposes them to positive social change efforts, and encourages authentic interactions between participants and residents.
- Create an identity-based giving circle focused on a specific population of donors that you have not historically engaged by providing educational opportunities and — if possible — matching contributions as a way of showing your support.

### High intensity

- Create centers of excellence that provide more customized service for the wealthiest segments of your community (e.g., athletes, families, corporations).
- Structure volunteer opportunities for local philanthropists to get together and advise the local nonprofits they care about.
- Offer most of your donor products and services on a mobile-first online platform to make the giving experience as seamless as possible for tech-savvy donors.

### Imagine: What if your organization...

- ...went paperless and conducted all transactions, document management, and donor communication digitally?
- ...had donor agreement forms read, "If you're not happy with us, we'll help you move your funds elsewhere"?

What ideas come to mind for your organization?

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# BUILDING CAPACITY

*Strengthening the skills and capabilities of people, organizations, and communities*



With the rise of the organizational effectiveness (OE) movement in the 1980s, philanthropic organizations have been increasingly focused on building the capacity of nonprofits. Indeed, a handful of community philanthropy organizations consider their primary role to be promoting nonprofit OE: they pair programmatic grants with OE grants, offer in-house OE training, and have even partnered with local academic institutions to create nonprofit OE training programs. And some community philanthropy organizations are now building the capacity of their community more broadly — including the capacity of individuals and organizations, both inside and outside of the nonprofit sector. These organizations are providing training, mentorship, and staff support to residents, community leaders, business entrepreneurs, and even local government.

**Roles that fall in this cluster include** promoting nonprofit OE, developing the skills of local residents, growing local entrepreneurs and businesses, and providing direct support to local government.

## Bright spots from community foundation

*Promising approaches from the field*



### Growing local entrepreneurs and businesses... What if you nurtured the growth of local entrepreneurs?

Telluride Foundation's **Telluride Venture Accelerator** (TVA) focuses on growing early-stage and start-up businesses in areas such as tourism and recreation, energy, and education. Each year, TVA enrolls up to six entrepreneurs in a five-month Telluride, Colorado-based accelerator camp, which includes a \$25,000 equity investment, mentorship, and networking. The program, which costs the Foundation \$350,000 and 1.5 full-time employees per year, taps Telluride's community of entrepreneurs and second homeowners as mentors; coordinates with small-business development centers for targeted training; and runs the tellurideXchange, an online community forum for entrepreneurs.

### Developing the skills of local residents... What if you became a leadership training ground?

Incourage Community Foundation in Wisconsin piloted an adaptive leadership training program for residents. The goal of the pilot was to build trust between participants and to equip them with the skills they need to promote citizen engagement and problem solving. With support from the Ford Foundation and the consultancy Ki ThoughtBridge, Incourage trained three cohorts totaling 100 residents over three years. One cohort subsequently worked with Incourage on a workforce development initiative sponsored by the Foundation. The Foundation now has two professional trainers on staff and plans to create a center for adaptive skills to make the training more accessible to additional residents.

### Providing direct support to local government... What if you provided your city/state government with catalytic dollars and content/process expertise?

The Hawaii Community Foundation has partnered with the State of Hawaii at critical moments to help it launch or accelerate statewide initiatives. For example, one of the Foundation's executive staff members worked with the Department of Education for six months prior to the launch of Race to the Top, convening key stakeholders and aligning government and private philanthropy. More recently, the Omidyar Ohana Fund at the Foundation provided \$4 million in seed funding to hire a chief information officer, who developed a strategic plan for to improve and modernize Hawaii's physical and online infrastructure. In 2012, the Foundation built a community coalition — Transform Hawaii Government — to help create public support for the 12-year infrastructure transformation initiative.

### Promoting nonprofit organizational effectiveness... What if you helped create a nonprofit resource center?

The Community Foundation Serving Richmond and Central Virginia worked with several other funders to create the **Partnership for Nonprofit Excellence**, a nonprofit resource center that provides local nonprofits with the tools they need to improve their effectiveness and efficiency for greater impact. The Partnership's services focus on four key areas: professional and leadership development; organizational and board development; volunteer opportunities, training and management; and technology, training, and communication. Today, the Foundation funds the Partnership, a separate nonprofit, and provides back-office services and a shared meeting space.

### Promoting nonprofit organizational effectiveness... What if you played matchmaker for nonprofits and service providers?

Victoria Foundation in Canada matches local charities with organizations that deliver useful programs. On the **Capacity Building section of its website**, the Foundation explicitly recommends 20 links for charities to follow and provides a description and link to each resource. Its recommendations range from the University of Victoria Continuing Education to Social Media Camp to **Charity Village**, a virtual community for charitable and nonprofit organizations with 3,500 pages of news, jobs, resources, how-to articles, volunteer and event listings, educational opportunities, and much more.



# Inspiration from analogous spaces

*Approaches from other types of organizations and industries*

## Providing direct support to local government... What if you helped government leverage outside expertise?

**Code for America** is a national nonprofit that collaborates with local governments to design better services and encourage civic participation. For example, Code for America places developers, designers, and urbanists in yearlong fellowships where they work with government staff to build Web apps and explore new approaches to local problems. Code for America also supports local peer networks where government innovators can receive training, connect to share resources and best practices, and collaborate on common problems.

## Developing the skills of local residents... What if you trained civic leaders in community organizing?

**Gamaliel** is a nonpartisan, faith-based community organizing network with a goal to empower residents to participate in the sociopolitical and economic decisions affecting their lives. It works bottom-up to train leaders, build community-based organizations, and help organize grassroots campaigns, as well as top-down to develop research opportunities and policy. Gamaliel has partnered with TASH, a nonpartisan service organization for people with disabilities, to make community organizing training available to its members.



## Ideas for taking action

*A sampling of approaches to consider*

### Lower intensity

- Encourage board and staff members to serve on nonprofit boards, to both provide additional support to the nonprofit community and to increase general awareness levels in your organization.
- Conduct a survey of leadership and organizational capacity-building opportunities in your community, make this list of resources available on your website, and refer individuals and organizations to it regularly.
- Provide OE grants to a set of your current grantees to help them build capacity to execute on programmatic goals.

### Medium intensity

- Work with a local college to develop a free or subsidized series of sessions for emerging nonprofit leaders and their board members, making sure to provide opportunities for peer learning and connection.
- Bring capacity-building intermediaries like Code for America to your community to help build your government's ability to effectively use technology to engage residents in civic life.

### High intensity

- Partner with other funders, nonprofit service providers, business schools, venture capital firms, etc., to develop a boot camp for commercially viable, socially responsible local start-ups.
- Provide externships to high-performing staff who want to participate in a specific change initiative in government or a nonprofit organization.
- Create opportunities for professionals to advise nonprofits in their area of expertise. For example, if you happen to be located in a tech-savvy area, take a cue from the Coastal Community Foundation of South Carolina by launching a volunteer-led and -run IT Help Desk for nonprofits.

### Imagine: What if your organization...

- ...partnered with a national community organizing agency to create a community-organizing training program for civic leaders in your community?
- ...worked with your local library or other area institutions to increase resident access to cutting-edge equipment, skills, and training?

*What ideas come to mind for your organization?*

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# ENGAGING THE COMMUNITY

Helping residents connect and get involved in addressing local issues



Although community philanthropy organizations traditionally focused on donors and nonprofits as their primary “customers,” they are increasingly starting to see local residents as critical stakeholders in their work as well. These organizations are enabling residents to meaningfully contribute their time and expertise to local organizations and causes, as well as providing residents with a safe space to share ideas, connect with one another, and collaborate in support of (or opposition to) issues or public policies. They are empowering residents with decision-making authority over grants — and, in some cases, over “all faces of planning, implementing, assessing, and developing efforts to strengthen communities” (CFLeads 2013). In a nutshell, these organizations serve their communities by inviting residents to become more active agents of change in their communities.

**Roles that fall in this cluster include** facilitating civic participation and volunteerism; providing avenues for community input, ideas, and connection; facilitating community dialogue; strengthening social connections among residents; empowering resident decision-making; and mobilizing residents around issues.

## Bright spots from community foundation

Promising approaches from the field



### Providing avenues for community input... What if you helped residents envision the future they want to see?

The Community Foundation of Greater Dubuque in Iowa cohosted a community-wide visioning process to identify the next 10 great projects that would move the city forward. The process, titled **ENVIS10N 2010**, brought thousands of residents together in boardrooms and living rooms alike to brainstorm more than 2,300 ideas. Informed by resident voting and opinion surveys, a 21-member committee winnowed this list to a top 10, which included a passenger train service, library expansion, and public walking trail. Today, all 10 ideas identified by the community have been implemented.

### Empowering resident decision-making... What if you allowed residents to make grantmaking decisions?

New Hampshire Charitable Foundation taps into the local expertise of 120 volunteers serving on eight regional advisory boards across the state to make competitive grant decisions. These volunteers are diverse in age, race and ethnicity, thinking styles, education level, and background. Combined, the competitive grants made by volunteers constitute 15 percent of the total amount disbursed by the Foundation; donor-advised funds make up another 50 percent; and the rest is allocated by staff and board, often in close consultation with partners, collaborators, and resident stakeholders.

### Mobilizing residents around issues... What if you got involved in doing community organizing?

Humboldt Area Foundation in California fosters resident leadership as a core function of its work and as a compass for decision making. In the past, it has engaged community members to direct rural-region initiatives in areas such as divisive timber wars, broadband access, and economic development policy and implementation. Currently, its programmatic staff work as organizers to train and mentor residents to carry out listening campaigns, nurture relationships, and negotiate systems-level solutions with policymakers on the issues that are most important to them — e.g., indigenous rights, recreational underage drinking, and school reform.

### Facilitating community dialogue... What if you created a safe space to discuss controversial community issues?

Communities Foundation of Texas in Dallas cohosts **community-wide conversations** about topics facing the community, such as the working poor and education. These conversations — which are open to the public and draw 40–50 participants — typically feature a panel of experts and civic leaders and are followed by plenary discussion and networking opportunities. The Foundation and its philanthropic, nonprofit, and media partners believe these conversations help build civic relationships among cause-minded people, regardless of ideology.

### Strengthening social connections among residents... What if you helped residents feel more engaged?

Vancouver Foundation in Canada launched a targeted initiative to help lonely and disengaged residents connect with community life. After a survey of 375 civic leaders revealed that the biggest challenge facing the community was a sense of social isolation, the Foundation surveyed nearly 4,000 residents in languages ranging from English and Spanish to Punjabi and Cantonese to identify specific pockets of disengaged residents. Based on this data, the Foundation modified and scaled a set of initiatives, including the Neighbourhood Small Grants program (to fund events that promote inclusion) and recent-immigrant and homeless youth outreach programs.



# Inspiration from analogous spaces

*Approaches from other types of organizations and industries*

## Strengthening social connections among residents... What if you intentionally nurtured networks of local leaders?

The Barr Fellowship recognizes extraordinary social change leaders in the Boston area and invests in their relationships with each other. The three-year fellowship offers a cohort of 12 local leaders a three-month sabbatical (including an international trip), semiannual overnight retreats, and opportunities to connect with the broader network of Barr Fellows. This effort is guided by the idea that strong networks, with deep relationships of trust and respect, would be able to self-organize and respond to a myriad of opportunities and challenges that may arise in the future.

## Providing avenues for community input... What if you created a space for generating community solutions?

Greenpeace runs a global lab that brings together changemakers to envision, test, and roll out creative new means of communicating, organizing, and fundraising online. The Mobilisation Lab, or **MobLab**, provides a variety of services, including hosting collaborative and multidisciplinary workshops; offering skill-building, knowledge-sharing, and network-building opportunities; and sharing innovation, lessons learned, failure stories, and emerging best practices, among other things.



## Ideas for taking action

*A sampling of approaches to consider*

### Lower intensity

- Identify and invest in natural “connectors” — residents who make introductions, broker connections across differences, and help other residents identify and act on opportunities.
- Cosponsor a panel focused on a challenge area in your community, and design the second part of the event as a networking opportunity for like-minded individuals.

### Medium intensity

- Interview five civic leaders who are not affiliated or engaged with your organization. Use the insights you gain about their aspirations, habits, and challenges to refresh your programmatic outreach efforts.
- Roll out a neighborhood small grants program to provide neighborhoods and community-based organizations the opportunity to build community, attract new and diverse members, and sustain those already involved.
- Hand over decision-making rights over a portion of your grantmaking to a representative group of local residents or leaders (subject to final approval).
- Conduct geography-specific listening sessions to hear from diverse parts of your community about local challenges and problems. Share your learnings and use them as input into your strategic planning process, being careful to manage expectations appropriately.

### High intensity

- Design a broad-based visioning process in which residents provide input about the future of the community, making sure that key decision makers are also involved. Follow up with grant support for the best ideas.
- Codevelop a multimedia initiative (e.g., art exhibit, TV/radio series, newspaper exposé) to encourage public conversation around a particularly divisive issue in your community (e.g., race relations, immigration).

### Imagine: What if your organization...

- ...created a **social lab** where local changemakers could come together to prototype creative solutions to problems in the community?
- ...coordinated with an organization like **Change.org** — a global, online petitioning platform — to create a local version of the site and then supported those petitions that got a threshold of resident votes?

**What ideas come to mind for your organization?**

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# SHARING COMMUNITY INFORMATION

Generating and providing access to information related to the local community



In many ways, the range of information available to communities is richer than ever before, as advances in technology have led to faster and cheaper distribution of data, fewer barriers to entering the news economy, and more creative ways to share information. But the potential of these tools has not yet been realized in many communities, and there has actually been a decline in traditional sources of news that once provided residents with access to the information they need to participate effectively in their communities. Many community philanthropy organizations are responding to this challenge by aggregating, analyzing, and creatively disseminating data about the community, often with support from larger national funders like Knight Foundation.

**Roles that fall in this cluster include** researching community issues and public policy, compiling information about local organizations and available resources, spreading local news, tracking data about community well-being, and measuring the outcomes and impacts of programs.

## Bright spots from community foundation

Promising approaches from the field



### Researching community issues and public policy... What if you rigorously examined difficult-to-face issues in your community?

In 2011, the Minneapolis Foundation in Minnesota released the first annual **OneMinneapolis** report, which tracks 25 community indicators by race/ethnicity and in some cases by home language, gender, and country of origin. The report indicated that Minneapolis faces costly racial disparities in education, jobs, housing, political representation, and other critical areas. As such, it served as both a community resource and a platform for addressing racial and economic disparities. Through the OneMinneapolis report, the Foundation aims to help its community better understand and improve the lives of all Minneapolis residents.

### Tracking data about community well-being... What if you conducted routine checkups of your community?

In 2001, the Toronto Community Foundation started Toronto's **Vital Signs Report**, a community-wide indicators project that continues to help the Foundation make informed choices about its programming. Today, 35 community foundations across Canada publish their own Vital Signs Reports, and Community Foundations of Canada, a national membership organization, now coordinates the Vital Signs initiative nationwide. Local media and government representatives routinely reference Vital Signs, which has become a go-to resource for information about the community.

### Compiling information about available resources... What if you were a resource center for underserved populations?

The Community Foundation of Tampa Bay in Florida cocreated an online repository of resources for disadvantaged youth. This portal, called **readyforlifepinellas.org**, connects young adults who are transitioning from foster care to independent adulthood with the resources they need (e.g., education, employment, health, housing, legal advice, transportation, life skills), and it also serves as a social networking space. It was created in partnership with the lead agency for community-based care in Tampa and more than 15 other local service providers and is managed by a separate nonprofit of the same name (which the Foundation helped launch).

### Spreading local news... What if you created a local news source for community residents?

Although starting a local news source can be an extremely challenging enterprise, the Winnipeg Foundation in Canada did just that. In partnership with Winnipeg Free Press, Red River College, and Winnipeg Public Library, and with a matching three-year \$202,000 grant from Knight Foundation, the Foundation cosponsored a grassroots public media project that includes an online media hub authored by and for residents. The project, titled **Community News Commons**, trains and enables citizens to share local news and tell inspiring stories about their neighborhoods. As such, it personifies the Winnipeg Foundation's deep commitment to remain accessible to local residents (as evidenced by its median gift size of \$100).

### Measuring the outcomes and impacts of programs... What if you helped nonprofits understand what works?

In 2010, the Arizona Community Foundation invested in a shared performance system for a cohort of nonprofits. The two-year initiative, titled **Project SAM**, was launched with a matching \$220,000 grant from the federal Corporation for National & Community Service and in collaboration with the Alliance of Arizona Nonprofits and the consulting firm FSG. Project SAM trained 13 small and mid-sized nonprofits focused on financial independence on the topic of shared measurement and supported them in the development of shared short-term indicators and data collection tools.



## Inspiration from analogous spaces

*Approaches from other types of organizations and industries*

### Researching community issues and public policy... What if you hosted fun community learning experiences?

The [Texas Tribune](#) is a nonprofit, nonpartisan media organization that reports on issues affecting Texans. It not only produces high-quality news content but also hosts free public events that engage the public in learning about issues affecting their community — and that become news in the form of tweets, blogs, and video content. Of the Texas Tribune's revenues, 20 percent comes from events — including ticket sales and sponsorships from the annual Texas Tribune Festival, which brings 2,000 Texan residents and prominent thinkers for dialogue and debate at the University of Texas at Austin.

### Tracking data about the community well-being... What if you made data about your community accessible and interactive?

Data Driven Detroit (D3), an affiliate program of the Michigan Nonprofit Association, serves as a one-stop shop for accessible, high-quality information and analysis about the city of Detroit and the metropolitan area. It houses a comprehensive data system that includes current and historic demographic, socioeconomic, educational, and other indicators; adapts data into different formats; and allows analysts to illustrate complex relationships between different data sets. D3 believes that enabling direct and practical use of data by grassroots leaders and public officials promotes thoughtful community building and effective policymaking.



## Ideas for taking action

*A sampling of approaches to consider*

### Lower intensity

- Use the [Community Information Toolkit](#) to assess how well residents in your community can access basic information about the community. Discuss the most pressing community information gaps with your board.
- Recognize and reward residents who are writing and blogging about meaningful issues in the community with a scholarship or prize and connections to more formal news media channels.
- Host a local TEDx or other event that is focused on an issue of importance for your community in order to give individuals and institutions the opportunity to learn and connect around topics that are important to them.

### Medium intensity

- Sponsor research on challenging community issues such as race, immigration, and economic inequity. Package research findings in an easy-to-read report and dashboard, and talk about these findings in the media.
- Map your community's news ecosystem, inventorying all local news resources and researching the information needs of local residents to guide efforts to build a stronger information infrastructure in your area.
- Develop a reporting, writing, and multimedia training program for local residents who are interested in contributing information to existing print and online local news platforms.
- Convene a set of issue-based nonprofits to help them create a shared performance measurement system, to both inform program development and bolster fund-raising efforts.

### High intensity

- Partner with an existing or emergent platform for sharing local news to sponsor a series on a pervasive issue facing your community (e.g., education, civic affairs, homelessness).
- Partner with an existing online platform to create an interactive database of community-based organizations, with information on their location, management, governance, financials, and programs and evaluations.
- Find out what type of quality-of-life information is being collected in your community, and work with local stakeholders to aggregate, analyze, visualize, and share this information with the broader community.

### Imagine: What if your organization...

- ...created processes for systematically integrating news and information into all your programmatic focus areas — in internal conversations, strategic convenings, and your organization's website?
- ...educated local government agencies about the importance of open data and partnered with them to increase access to local information and news?
- ...worked with other community foundations regionally and nationally to agree on a common set of well-being indicators to track?

*What ideas come to mind for your organization?*

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# ALIGNING ACTION

Coordinating efforts across multiple organizations to increase social impact



Community philanthropy organizations have long recognized that they cannot single-handedly solve the social issues they take on and that they are uniquely positioned to connect ideas, people, and resources because of their neutrality, donor relationships, and nonprofit connections. However, the extent to which they have partnered and otherwise coordinated with other actors on issues of programmatic priority has varied dramatically from community to community. In the past decade, more and more community philanthropy organizations nationwide have self-identified as neutral brokers who convene diverse stakeholders. As technology makes it increasingly easy to connect and coordinate, community philanthropy organizations continue to explore a range of new ways that they can align social action efforts in their communities.

**Roles that fall in this cluster include** facilitating learning networks, coordinating funding and activities, building collaboratives, and managing formal collaborations.

## Bright spots from community foundation

Promising approaches from the field



### Coordinating funding and activities... What if you aligned resources going into health and human services?

The Ann Arbor Area Community Foundation in Michigan is working with cross-sector actors to make funding more strategic and efficient in the Ann Arbor area. More specifically, the Foundation is involved in the **Coordinated Funding Initiative** with the Office of Community & Economic Development, the United Way of Washtenaw County, and the RNR Foundation. They have been working intensively together for three years and have thus far established shared community outcome measures in six human service areas, streamlined the grant application and reporting process, and integrated government agency voices into their decision making.

### Facilitating learning networks... What if you offered peer-to-peer learning opportunities for nonprofits?

The Greater Cincinnati Foundation in Ohio has made a five-year commitment to support a learning cohort of seven backbone organizations. These backbone organizations are project managers, data managers, and facilitators of local **collective impact** initiatives, focused on issues ranging from early childhood education to workforce development and housing. The Foundation is working with the consulting firm FSG to both evaluate the work of these organizations and create a community of practice among them that enable them to learn from each other about successful strategies, improve their practice, and collaborate on overlapping activities.

### Building collaboratives... What if you acted as a bridge between local funders and city government?

Responding to a request from the Mayor of Chicago, the Chicago Community Trust spearheaded a public-private partnership to coordinate and streamline the distribution of federal stimulus funding. The Trust formed the **Chicago Recovery Partnership** with 150 partners, including 50 local funders, and with pro bono advisory service support from the local business community. The Partnership put together and deployed cross-sector teams that processed grant applications, targeted the funds, developed transparent outreach efforts, and worked with local universities to evaluate its efforts. The result was timely distribution of \$1 billion in stimulus funding and the successful win of an additional \$1 billion in competitive grants.

### Managing formal collaborations... What if you helped stakeholders develop a shared vision and action plan?

The Community Foundation for Greater Buffalo created and managed a cross-sector collaborative focused on lead poisoning as a major, avoidable barrier to academic success. It convened 67 cross-sector partners and facilitated the creation of a shared vision and action plan and as a result of its efforts was selected as a pilot site for a similarly focused **national program**. It later rebranded the collaborative as the **Green & Healthy Homes Initiative**, sharpening the focus on developing an integrated system of services for low-income homeowners and using the collaborative as a fund-raising platform. The Foundation leveraged its own investment of \$698,000 by attracting \$6.4 million (a 1:9 ratio).

### Building collaboratives... What if you rallied stakeholders together to pilot new programs?

The East Bay Community Foundation in California piloted **Good Deeds**, a private-public partnership that acquired, rehabbed, and sold homes to working families during the housing crisis. A for-profit real estate developer helped identify and rehab properties; a nonprofit acquired and sold the homes and oversaw the rehabilitation process; a local bank provided financing; the Foundation and individual and corporate funders guaranteed the project against losses and acted as a line of credit; and several nonprofits identified qualified families and provided them with financial counseling and down-payment assistance.



## Inspiration from analogous spaces

*Approaches from other types of organizations and industries*

### **Coordinating funding and activities... What if you aligned a comprehensive suite of services to revitalize one underserved neighborhood?**

**Purpose Built Communities** is a nonprofit consulting firm that works with local leaders to transform struggling neighborhoods. Its model focuses on three improvements: high-quality mixed-income housing, a college-education pipeline, and wellness resources. To execute these, a community-based lead organization aligns with neighborhood residents and public and private stakeholders and investors (e.g., the Housing Authority and YMCA) to implement a holistic revitalization plan. In East Lake Meadows, these efforts have led to a 95 percent reduction in violent crime and a \$175 million increase in residential and commercial investment.

### **Building collaboratives... What if you used system mapping to better understand the complex problems facing your community?**

In 2004, the Garfield Foundation initiated RE-AMP, which is now a network of more than 170 nonprofits and funders focused on reducing global warming pollution in eight Midwestern states. One of RE-AMP's initiating activities involved creating a "system map" of relevant forces and players in the electricity sector, as seen through a variety of stakeholder perspectives. This process helped members agree on a time-specific goal (reducing greenhouse emissions by 80 percent by 2030) and four high-impact leverage points. In just the past few years, RE-AMP has had tremendous success; for example, it has helped legislators pass energy efficiency policies in six states, contributed to the retirement of 78 dirty coal plants, and prevented 31 more from coming on-line.



## Ideas for taking action

*A sampling of approaches to consider*

### **Lower intensity**

- Deliberately partner or co-fund with one other organization. These "twosies" build trust and relationships that can undergird larger collaborations later on.
- Play matchmaker: find pairs of leaders who are not currently connected but could learn from each other's work, and arrange an informal introduction.
- Survey your community for preexisting partnerships or collaborations in your priority-issue areas. Find out how you can leverage your financial, intellectual, social, and political capital to support and connect them.

### **Medium intensity**

- Convene a community of practice of organizations interested in a particular issue so you can all learn and get smarter about the issue together.
- Think about the typical grant solicitation experience of your local nonprofits. Work with local funders to improve the grant application process (e.g., to streamline applications and align funding strategies).

### **High intensity**

- Choose a single underserved neighborhood on which to focus. Create a map of the people and organizations serving that neighborhood, and use this map to stimulate discussion about the coordination of funding and resources.
- Hire a dedicated network weaver or coalition-building staff to connect individuals, actions, and resources across traditional divides in your community.
- Convene diverse stakeholders who are working on a similar issue to discuss their definition of success, requirements and barriers to success, and potentially game-changing opportunities. Look for areas of overlap that could become common ground.

### **Imagine: What if your organization...**

- ...co-created a system map of a pressing local issue with local stakeholders and actively worked with those stakeholders to address the key leverage points you have identified together?

*What ideas come to mind for your organization?*

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# ADVOCATING

Publicly supporting or promoting a particular cause, program, or policy



While some community philanthropy organizations consider themselves to be neutral or impartial actors, others have begun to articulate a clear point of view. These organizations are shining a light on critical community issues and their underlying root causes. They are formulating and sharing perspectives on the effectiveness of particular organizations and interventions. And in some cases, they are leveraging their local experience, knowledge, and connections to actively promote organizations, programs, and policies that they believe are best for their constituencies. These community philanthropy organizations are expressing their views in conversation with other funders, in the media, and at city councils and state legislatures — and some have gone as far as keeping lobbyists on retainer to more formally advocate for important policy changes.

**Roles that fall in this cluster include** promoting specific organizations or interventions, influencing public opinion, influencing government and business priorities, and lobbying for public policy change.

## Bright spots from community foundation

Promising approaches from the field



### Influencing government priorities... What if you fought for more equitable allocation of public resources?

The Community Foundation of Greater New Britain in Connecticut works at the local and state levels to influence early childhood systems as its primary focus. The Foundation helped found the Connecticut Community Foundations Public Policy Committee, partnered with other funders to create a new State Office of Early Childhood, took public positions in favor of full-day kindergarten in two of its communities, and built a multi-stakeholder collaborative that successfully advocated for additional early childhood funding. As a result of these efforts, access to New Britain preschools doubled from 32 percent among all three- to four-year-olds in 2002 to 79 percent in 2008.

### Promoting specific interventions... What if you regularly voiced an opinion about local issues?

The Baltimore Community Foundation's leadership regularly shares its views on news, issues, and public policy in the local newspaper. More specifically, CEO Tom Wilcox works with his board to author and publish articles on the op-ed page of the *Baltimore Sun*, Maryland's largest general-circulation daily newspaper. For example, in a February 2014 article titled "[Rebuilding Schools, Rebuilding Baltimore](#)," Wilcox and two board members urged the General Assembly to pass the city's legislation to build or rebuild school buildings in order to "give every child in the city a welcoming school environment that will help engage them in learning."

### Lobbying for public policy change... What if you actively participated in local and state politics?

The Silicon Valley Community Foundation in California has taken a strong stand against payday lenders. It testified at city, county, and state government meetings to educate officials about payday lending; met with legislators one-on-one to ask for their vote on bills; and even put a lobbyist on retainer. In addition, it funded 501(c)(3)s, 501(c)(4)s, and even city government departments to conduct research and raise awareness and formed a coalition of grantee advocates against predatory lending. As a result of the Foundation's advocacy, lawmakers enacted various laws strengthening consumer protections, stopped attempts to raise the maximum loan amount, and established a payday loan alternative pilot.

### Influencing public opinion... What if you spoke out on behalf of underrepresented populations?

The Napa Valley Community Foundation in California is taking a public stand on immigration — an issue that is crucially important to its region. It started by funding research showing that immigrants are vital to the local economy. Next, it used this data to both facilitate dialogue among thousands of residents and to speak out about the topic in public media. Finally, the Foundation raised \$1 million from 85 donors to launch the [One Napa Valley Initiative](#), which provides legal permanent residents with comprehensive support, including English classes and low-cost naturalization services.

### Promoting local organizations... What if you acted as an ombudsman for the nonprofit sector?

The Community Foundation of Prince Edward Island in Canada has taken steps to support the work of the local nonprofit sector. It first used research grant money from the federal and provincial governments to study the [positive economic impact](#) of nonprofits on the Island, using measures such as number of jobs created, revenues collected, and volunteer hours utilized. Next, it established the Community Sector Network Working Group, which has developed profiles and a complete database of all local nonprofits and which plans to study the impacts of a new provincial tax on the nonprofit community, among other activities.



# Inspiration from analogous spaces

*Approaches from other types of organizations and industries*

## **Influencing public opinion... What if you raised awareness about pressing social issues?**

In 2008, the Nike and NoVo Foundations, working in collaboration with the United Nations Foundation and Coalition for Adolescent Girls, launched **The Girl Effect**: a campaign to unleash the potential of 250 million girls living in poverty around the world. The campaign used Nike's world-class branding and communications capabilities to create online engagement tools, including a video that went viral. As a result, supporters have contributed some \$1.4 million online, and girls have become a major part of the agenda at the Clinton Global Initiative and the World Economic Forum.

## **Lobbying for public policy change... What if you asked your constituents to advocate with you?**

The National Rifle Association (NRA) is a lobbying firm, campaign operator, and industry group as well as a charitable funder, trainer-educator, and popular social club. This allows the NRA not only to influence policy top-down but also to cultivate a vast membership that **supports its political negotiations bottom-up**. In order to undertake this diverse set activities, the NRA has 501(c)(4) status, a 527 organization, and four 501(c)(3) subsidiaries.



## **Ideas for taking action**

*A sampling of approaches to consider*

### **Lower intensity**

- Educate your board about permissible forms of advocacy and public policy activities for your organization by using publicly available resources like the **Foundations for Civic Impact toolkit** and the **Advocacy Capacity Tool**.
- Identify a community issue that your board would feel comfortable acting on in the near term. Aggregate, support, and highlight research that makes the case for change and recommends next steps.
- Provide project and operating support to grantee organizations that engage in advocacy work and whose stance aligns with your organization's point of view.

### **Medium intensity**

- Create a curated list of the most effective local nonprofits (even if it's just a list of your grantees). Highlight them on your website, in conversation with other funders, and in local and national media.
- Coauthor an op-ed with the executive director/CEO and a board member in which you take a stand on a community issue that you care about and that also overlaps with one of your areas of focus.
- Become an active member of a local coalition with a specific policy agenda that stands to positively impact your programmatic work.

### **High intensity**

- Actively campaign and solicit other funders and donors to promote one or two of the most effective, proven organizations in your community.
- Launch a public awareness campaign about a challenging issue in your community that also ties to a major program or initiative of your organization — make sure the campaign has a compelling narrative and a clear "ask."
- Keep a public policy guru or lobbyist on staff or on retainer, and establish a presence in your state's capitol.

### **Imagine: What if your organization...**

- ...conducted a public education campaign on a public policy issue and provided your constituents with the information and tools they need to mobilize themselves?
- ...worked with a local or state chapter of a national political action committee that focuses on your organization's programmatic areas of focus?

**What ideas come to mind for your organization?**

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# COMMUNITY PLANNING

Helping to guide the future development of various aspects of the community



Some community philanthropy organizations, particularly those in rural areas, have been informing, influencing, and designing city and regional and economic development plans for some time. Others have more recently begun guiding and shaping various types of local planning processes that aim to make their communities healthier and more equitable, efficient, attractive, and resilient. For example, community philanthropy organizations have spearheaded green space and trail-planning campaigns, launched initiatives to prepare and coordinate plans for disaster response and relief, and jump-started efforts to bring long-term community interests into city and regional planning conversations. In the face of the devolution of government (the transfer of control over certain programs and policies from federal to state or local government) and the decrease in discretionary spending on social service programs, even more community philanthropy organizations may need to compensate for planning gaps in their communities in the future.

**Roles that fall in this cluster include** facilitating urban/rural planning processes, promoting economic development planning, planning for disaster response and prevention, and proactively planning for the long term.

## Bright spots from community foundation

Promising approaches from the field



### Facilitating urban/rural planning processes... What if you shepherded a multiyear planning project from concept to implementation?

Central Indiana Community Foundation championed the **Indiana Cultural Trail**, a \$63 million, eight-mile urban bicycle and pedestrian trail that runs through the heart of downtown Indianapolis. The Foundation pitched the concept to civic leaders, got the city-planning department to sponsor a feasibility study, cocreated a broad-based fundraising committee to advise and advocate for the project, and hired a trail designer and management team. At the end of the 12-year process, the Foundation had contributed less than 1 percent of the total funding, having raised the rest from individual and institutional donors, and from local and federal governments.

### Promoting economic development planning... What if you tapped residents to design and implement a regional economic development plan?

The Community Foundation of Greater Des Moines worked with government, university, and private-sector stakeholders to create a regional visioning and planning process for Iowa's capital region. The analytically rigorous process also engaged more than 5,000 residents. The process included more than 50 one-on-one interviews, 30 focus groups, and online surveys distributed by employers and academic institutions. The resulting five-year regional road map, called **Capital Crossroads**, highlights 11 interrelated plans. Volunteer implementation committees are engaging more than 500 civic leaders to guide the refinement and implementation for each plan.

### Proactively planning for the long term... What if you invested in innovative solutions to persistent community issues?

The London Community Foundation's three-year-old **Community Vitality Grant Program** supports game-changing endeavors to address Ontario, Canada's long-term and future community concerns in radically new ways. Thus far, the Foundation has given away more than \$1.2 million in seed and start-up funding to 10 nonprofits and programs. Among these is the Poverty Research Centre, which is founded on the belief that poverty is endemic in London, but not inevitable. The Centre will both aggregate research reports on poverty and partner with researchers at Western University to conduct "living labs" or user-centered studies to better understand Ontario's poorest residents and the factors that contribute to their poverty.

### Planning for disaster response and prevention... What if you prepared service providers to operate effectively in emergency situations?

The Community Foundation of the Ozarks in Missouri is leveraging a \$250,000 grant from the Margaret A. Cargill Foundation to pilot a **resilient community program**. The pilot aims to prepare a diverse set of 30 nonprofits to serve as second responders in crisis situations. By the end of the pilot, which includes four monthly sessions, participating nonprofits develop recovery plans (e.g., facility, financial, and technological backup plans and internal/external communications plans) and are eligible for \$5,000 implementation grants. The Offices of Emergency Management now intends to engage this group of next responders in their disaster networks.

### Promoting economic development planning... What if you invested in environmentally sustainable, high-growth potential industries?

The Cleveland Foundation is catalyzing a local wind-industry sector through research, public education, and advocacy. The Foundation-led advocacy efforts resulted in state legislation requiring energy companies to source 25 percent of their electricity from alternative energy sources. The Foundation also traveled internationally to attract wind-turbine manufacturers to Ohio, helped align the region's manufacturing base to supply components for wind turbine production, and is the primary local investor in a **regional effort** to build the United States' first freshwater offshore wind farm in Lake Erie.



# Inspiration from analogous spaces

Approaches from other types of organizations and industries

## Proactively planning for the long term... What if you prepared your community for future vulnerabilities?

The Nature Conservancy identified three future urban environmental challenges (i.e., sustainable food, water, and energy) and has launched the **Urban Strategies** pilot to help five cities prepare for those challenges. In each city, the Conservancy is encouraging innovation and collaboration around four specific strategies: freshwater protection, coastlines preservation, healthy tree canopies, and environmental leadership development.

## Planning for disaster response and prevention... What if you created an easy-to-use resource to increase emergency preparedness and recovery in your area?

In response to a tornado that devastated their hometown in Western Massachusetts, two young women created easy-to-use disaster preparedness software that can be deployed in any community. **Recovers** connects residents, government agencies, and community-based organizations and can be used to request or respond to help, offer or retrieve donations and volunteers, find important recovery information, and more. Recovers received initial funding from the Knight Foundation; today, it charges communities (local government or community-based organizations) a sliding-scale fee to access the software and receive related training and support.



## Ideas for taking action

A sampling of approaches to consider

### Lower intensity

- Use **Shift Happens: Understanding how the world is changing** to initiate a conversation with your staff and board about trends that are changing your community. Discuss whether current programming and services in the area are aligned with where your community is headed.
- Identify a diverse group of organizations that could play a role in disaster relief and recovery. *How prepared are they to respond to a community crisis? Are they well coordinated?* Start a conversation about ways they could coordinate their relief and/or recovery plans.

### Medium intensity

- Take a cue from the Community Foundation for the Alleghenies' **Lift Johnstown** program by aggregating the various community development plans that have been developed by stakeholders in your community, looking for areas of overlap and ways to leverage resources across the plans, and initiating a conversation among stakeholders to explore these possibilities.
- Advocate for and help create diverse task forces that can inform community-planning processes already under way in your community. Include nonprofit, neighborhood group, religious, and youth representatives.

### High intensity

- Lead a community visioning process to identify promising projects behind which there's a lot of energy. Encourage groups of residents to implement these projects, providing them with the resources and support they need.
- Identify high-potential infrastructure projects for your community (e.g., a downtown pedestrian and bike path). *Who could you rally to help develop and execute your vision? What would they need to know to go along with your plan?*
- Launch a citywide media campaign, or a game like **World Without Oil**, to help residents think through and prepare for what they would need to do in emergency situations.

### Imagine: What if your organization...

- ...acted as the sensing organ for your community, partnering with local experts and futurists to explore critical issues that may not emerge for another 5–10 years?
- ...served as a land trust to permanently conserve your community's natural resources?

What ideas come to mind for your organization?

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# DIRECT SERVICE AND PROGRAMMING

Designing, incubating, or managing services and programs in the community



While most community philanthropy organizations fund nonprofits to run community programs, a small number of funders are rolling up their sleeves and doing it themselves. That is, they are closely engaged in the design, incubation, and operation of programs, nonprofits, and even businesses in their communities. This type of activity isn't always appropriate for community philanthropy organizations, and duplicating the services of existing local organizations is rarely (if ever) advisable. But in certain places — particularly in rural settings — community philanthropy organizations can fill important gaps in service delivery or make up for nonexistent or overburdened nonprofit and local government infrastructure. In other cases, funders are stepping up to the plate where local and/or federal governments have reduced or withdrawn programming.

**Roles that fall in this cluster include** starting new nonprofit programs, managing direct service programs, designing government interventions, managing government programs, and incubating social enterprises or businesses.

## Bright spots from community foundation

Promising approaches from the field



### Incubating social enterprises...

#### What if you launched a social enterprise that addressed a critical local need?

Taking its cue from an effort run by the Cleveland Foundation, the Community Foundation for Greater Atlanta is incubating a start-up business. **Atlanta Lettuce Works** will supply local, sustainably grown lettuce to Atlanta's universities, hospitals, and retail stores while providing a living wage and profit-sharing rights to employees from underserved neighborhoods. The Foundation is partnering with anchor institutions to guarantee demand, with Emory University students to conduct a feasibility study, with local families from these neighborhoods to provide land, with the Center for Working Families to provide job training, and with interested donors to provide start-up funding.

### Designing government interventions... What if you took a leadership role in the design of a radically different program?

Santa Fe Community Foundation is helping a coalition pilot a new criminal justice and drug abuse program in the city of Santa Fe, New Mexico, which has one of the highest per capita rates of injection drug use. The program, titled Law Enforcement Assisted Diversion, will offer opioid users who would otherwise be arrested a long-term treatment option. The Foundation is helping to convene cross-sector stakeholders, functioning as the funding and finance hub for the coalition, and bringing public attention to this innovative new program. It has already designed a cost-benefit analysis that was used to attract public and private funding to pilot the project.

### Managing direct service programs... What if you ran a program that addressed a critical community need?

In 2009, the Boston Foundation launched a five year initiative called StreetSafe Boston in collaboration with community and faith-based organizations, city agencies, and other funders. The program focuses on two core strategies in five neighborhoods: street-level gang intervention and neighborhood-based service delivery. It deploys a team of trained, credible Streetworkers to interrupt violence, mediate conflict, and influence gang-involved youths to engage in pro-social programs. It also provides case management and support; immediate access to legal, housing, family, and mental services and programs; and an in-house transitional employment program. The Foundation began StreetSafe because it could serve as a central organizer to attempt this multi-pronged program.

### Starting new nonprofit programs...

#### What if you incubated programs and spun them off to local nonprofits?

Tomorrow:Today Foundation in rural Australia decided to incubate a yearlong teenage parenting program to provide teenage mothers with additional training and support under its small grants program — for less than \$300. To do this, the Foundation bought a large toy collection; brokered connections with local doctors, teachers, and others who would volunteer their time to give young mothers helpful tips about toddler health and education; and marketed the program as a play session for toddlers of teenage moms. Three years in, the Foundation transitioned the management of the group (now called the Young Parents Group) to a local youth service provider.

### Managing government programs... What if you provided local planning services for your region?

West Central Initiative coordinates **regional transportation planning** for the Minnesota Department of Transportation and economic development planning for the U.S. Economic Development Administration, because the nine-county region disbanded the local planning organization decades earlier. This work has helped build the Initiative's unrestricted endowment while complementing its other development work and strengthening relationships with the local government. The Initiative employs planning staff to coordinate this work within the region and to develop the necessary committee infrastructure to do the work effectively.



# Inspiration from analogous spaces

*Approaches from other types of organizations and industries*

## Managing direct service programs... What if you piloted a demonstration program for serving underserved populations?

The **United Way of Northeast Florida** piloted a program to reduce high school dropout rates in partnership with the local school district, faith-based organizations, and other nonprofits. The pilot, called Achievers for Life, targets disengaged sixth graders by providing them with a mentor — a resident volunteer who is trained by the program — and access to counseling, family support, and other services that increase family involvement. Within the first year, participating students experienced an 11 percent increase in promotion rates and a 31 percent increase in GPA.

## Incubating social enterprises... What if you matched social entrepreneurs with mentors, donors, and investors?

The **Unreasonable Institute**, a global think tank, runs annual five-week immersive boot camps to help scale social ventures. During the boot camp, the Institute brings together 12 ventures, 50 mentors, and 100 funders under one roof. Afterward, it provides boot campers with pro bono executive coaches, and its staff offers fund-raising support and access to a network of more than 100 mentors, 250 funders, and 82 ventures in 37 countries. The Institute has thus far helped social ventures raise \$38 million and affect more than 2 million people worldwide.



## Ideas for taking action

*A sampling of approaches to consider*

### Lower intensity

- Use the *What's Next Landscape Mapping* exercise to identify roles that others in your community are playing to address your priority-issue areas. Start a conversation with your board about ways to help close the gaps that surface in your analysis.

### Medium intensity

- Work with local government officials to identify a public program that falls within, or is related to, your programmatic focus areas and is in critical need of reform. Explore ways to provide the resources and support needed to help redesign and improve that program.
- Identify an underserved geography with lower access to human services and community programming. If appropriate, hire a part- or full-time staff person to work with residents to assess what are the most critical unmet needs and develop and launch prototypes for addressing them.

### High intensity

- Manage an open, free community space (like **freespace**, for example) where local changemakers can come together to connect, share information, make art, and prototype new ideas. Rent out part of the space to a for-profit business, such as an art gallery or café, to cover operating costs.
- Loan a senior staff member with deep expertise on a particular issue to help design and implement a government program.

### Imagine: What if your organization...

- ...created a B corporation — a for-profit enterprise that meets rigorous standards of social and environmental performance, accountability, and transparency — that helped to address a market failure or unmet need in your community?

*What ideas come to mind for your organization?*

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## Next steps

This document can lead to a wide range of additional follow-on activities, briefly described below:

- **Use the catalog of bright spots with your board and staff as a discussion tool to stimulate new ideas.**
  - Share relevant sections of this document with your board and/or senior leaders. Ask board members to capture ideas for action that they think would have the most impact on the community. Facilitate a conversation about their favorite ideas, why they chose them, and whether these ideas would make sense for your organization.
- **Search for other bright spots and analogous spaces to help continuously inform your work.**
  - Encourage your staff to regularly look for bright spots and analogous spaces (i.e., approaches from other types of organizations or industries). Create a virtual or physical space (e.g., a bulletin board) where people can post information about related efforts that seem like they might be relevant or instructive to your organization. Or have board and/or staff members deliberately ask one knowledgeable contact about the bright spots they see and then share what they learn with the rest of the organization. Try to embed processes for doing this type of ongoing scouting into your program and overall strategic planning processes, and use what you learn to inform your discussions and decision making.
- **Build a clearer picture of the roles you and others play in your community.**
  - Having explored many of the bright spots in the field, use the [Prioritizing Roles](#) exercise to align your leadership around the set of roles you play today, the aspirational roles you might want to play in the future, and the roles that are inappropriate for your organization.
  - Take a closer look at the sections of this document that resonate *most* with your leadership — the clusters of roles that your organization currently does well or aspires to do in the future. Use the [Landscape Mapping](#) exercise to help you understand who else is already playing those roles in your community and what it might mean to collaborate or compete with them. Partnering with others who complement your core areas of expertise is often an effective way to focus and leverage limited resources.
- **Educate your board and staff about orthodoxies and future trends.**
  - Take a closer look at the section(s) of this document that you think would appeal *least* to your staff, senior leaders, and board members. If you think that any of these sections represent an unchallenged — and unhelpful — assumption about how your organization does its work, use the [Flipping Orthodoxies](#) exercise to identify and confront the assumptions.
  - Help your leadership view the bright spots contained in this document with new eyes by educating them about future trends influencing your community. Hand your board relevant sections of [Shift Happens: Understanding how the world is changing](#) in advance of a board meeting, discuss the potential implications of these trends on your community, and use the conversation to inform which roles your organization could and should play in the years to come. Consider doing the same with staff and senior leaders.
- **Use the bright spots as a starting point to help you think creatively about new ways to play selected roles.**
  - If you found that your board and/or senior staff members were particularly interested in playing a particular role, bring together a diverse group to use the [Generating New Ideas](#) design to help you generate new ideas about how you can play the roles that you have identified. And once you generate promising new ideas and approaches, you can then use the [Prototyping Solutions](#) exercise to play out what an innovation might look like if you decided to implement it.

# Glossary

## **Expanding financial capital: Increasing the assets available to support community change efforts**

- **Educating the public about philanthropy:** raising awareness and teaching residents about the practice of giving financial and other assets to improve the community
- **Soliciting giving from local donors:** raising financial and other types of capital (e.g., real estate, farmland, water rights) from local individuals and institutions
- **Soliciting capital from outside the community:** raising financial and other types of capital from individuals and institutions located outside the geographic boundaries of the community
- **Deliberately attracting diverse donors:** raising funds in a targeted way from groups of people who have traditionally been underrepresented in your donor base
- **Developing earned income to support social-purpose activities:** leveraging donated assets or creating new service lines in order to generate revenue for your organization

## **Deploying financial capital: Using monetary assets to support organizations, programs, and people**

- **Grantmaking to nonprofits:** disbursing grants to nonprofits and registered charities
- **Supporting individuals:** providing financial and other types of capital to residents (e.g., scholarships and fellowships)
- **Directly connecting givers and recipients:** creating platforms that allow residents to give directly to causes, organizations, and individuals
- **Impact investing:** making investments that generate social and environmental impact as well as financial returns

## **Financial and donor services: Providing financial and philanthropic assistance to individual and institutional donors**

- **Managing investments/endowment funds:** investing endowed or nonendowed assets to generate financial returns
- **Managing transactions for donors:** overseeing the transfer of funds from donors to recipients
- **Educating donors about community issues:** teaching philanthropists about issues and policies that are affecting the community
- **Connecting local philanthropists with each other:** creating opportunities for donors to connect, discuss ideas, volunteer, and otherwise build and strengthen relationships

- **Providing philanthropic advisory services:** helping donors clarify their philanthropic intentions and offering guidance and specific recommendations to assist them with their giving
- **Co-creating initiatives with donors:** working collaboratively with donors to design new approaches, initiatives, or programs that are aligned with their interests

## **Building capacity: Strengthening the skills and capabilities of people, organizations, and communities**

- **Promoting nonprofit organizational effectiveness:** helping nonprofits build skills and capacity to better deliver programs and achieve intended outcomes
- **Developing the skills of local residents:** helping community members develop skills and capabilities that help them become more engaged and productive members of their community
- **Growing local entrepreneurs and businesses:** providing training and other support to people who are starting business ventures in the community
- **Providing direct support to local government:** helping elected representatives and government agencies more effectively provide services and support to local communities

## **Engaging the community: Helping residents connect and get involved in addressing local issues**

- **Facilitating civic participation and volunteerism:** providing opportunities for residents to get involved and engaged in efforts to improve their communities
- **Providing avenues for community input, ideas, and connection:** creating channels for residents to contribute their ideas and plan community action
- **Facilitating community dialogue:** catalyzing a process that allows residents to voice their opinions and engage in discussions about local issues
- **Strengthening social connections among residents:** creating opportunities for local residents to interact and build relationships and trust
- **Empowering resident decision-making:** giving local residents greater voice and control over resource allocation decisions
- **Mobilizing residents around issues:** organizing the efforts of community members to help them advocate on behalf of their own interests

### **Sharing community information: Generating and providing access to information related to the local community**

- **Researching community issues and public policy:** investigating and building knowledge about topics of importance to the community
- **Compiling information about local organizations and available resources:** aggregating and sharing information about available government and nonprofit service providers
- **Spreading local news:** creating and sharing information about what is happening in the community across a variety of different media platforms (e.g., Web, television, print, radio)
- **Tracking data about community well-being:** measuring and sharing information about critical indicators of community health, well-being, and quality of life
- **Measuring the outcomes and impacts of programs:** assessing the effects and impacts that different interventions are having on people, organizations, and the broader environment

### **Aligning action: Coordinating effort across multiple organizations to increase social impact**

- **Facilitating learning networks:** helping a network of organizations or individuals learn together about local challenges and potential solutions
- **Coordinating funding and activities:** helping individuals and institutions align effort and resources so that their impact has the potential to be greater than the sum of their parts
- **Building collaboratives:** bringing together multiple stakeholders to work collaboratively on particular issues
- **Managing formal collaborations:** overseeing the strategy and day-to-day functioning of a group of stakeholders that are working together

### **Advocating: Publicly supporting or promoting a particular cause, program, or policy**

- **Promoting specific organizations and interventions:** publicly encouraging support for particular local institutions and their programs
- **Influencing public opinion:** raising awareness and changing prevailing attitudes and beliefs about important local issues, causes, and policies
- **Influencing government and business priorities:** working to change the operations or allocation of a local government or business resources
- **Lobbying for public policy change:** attempting to influence policy decisions made by officials in the government

### **Community planning: Helping to guide the future development of various aspects of the community**

- **Facilitating urban/rural planning processes:** helping to design and guide the physical development of both urban, suburban, and rural communities
- **Promoting economic development planning:** supporting efforts to guide and promote the development of the local economy
- **Planning for disaster response and prevention:** developing procedures and processes for avoiding and responding to environmental and man-made disasters
- **Proactively planning for the long term:** deliberately anticipating and addressing issues that might affect the community in the future and that may not currently be on the public agenda

### **Direct service and programming: Designing, incubating, or managing services and programs in the community**

- **Starting new nonprofit programs:** launching or incubating a social service program that addresses an unmet community need
- **Managing direct service programs:** overseeing the day-to-day functioning of a social service program that addresses a local need or issue
- **Designing government interventions:** helping government agencies develop effective public service programs that address key community needs and problems
- **Managing government programs:** overseeing the day-to-day functioning of a public service program traditionally provided by the government
- **Incubating social enterprises or businesses:** spearheading the creation of social-purpose ventures or other types of local businesses

#### **ABOUT MONITOR INSTITUTE**

Monitor Institute is a social change consultancy that works with innovative leaders to surface and spread best practices in public problem solving and to pioneer next practices — breakthrough approaches for addressing social and environmental challenges. Monitor Institute marries a deep grounding in strategy, networks, social innovation, and human systems with the fundamentals of professional advisory services — effective project management, skilled facilitation and well-timed intervention. As a for-profit/for-benefit hybrid, Monitor Institute pursues social impact while operating as a fully integrated unit of Deloitte Consulting LLP, a subsidiary of Deloitte LLP. For more information about Monitor Institute, visit [www.monitorinstitute.com](http://www.monitorinstitute.com).

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#### **ABOUT THE WHAT'S NEXT FOR COMMUNITY PHILANTHROPY INITIATIVE**

This document is part of the *What's Next for Community Philanthropy* toolkit, which was published by Monitor Institute in June 2014 with support from the Council on Foundations, the Charles Stewart Mott Foundation, the W.K. Kellogg Foundation, and Community Foundations of Canada, along with more than 15 North American community foundations.

The What's Next toolkit aims to help community philanthropy organizations apply innovation and design methodologies to think creatively about their business models and the broader future of the field. The research for this toolkit involved nearly 200 interviews with leaders of community foundations and other community philanthropy organizations, as well as more than a dozen interactive workshops and user feedback sessions.

Visit [monitorinstitute.com/communityphilanthropy](http://monitorinstitute.com/communityphilanthropy) to learn more about the What's Next toolkit and research methods.

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