

WHAT'S NEXT *for* COMMUNITY PHILANTHROPY



LANDSCAPE MAPPING: Understanding who's doing what in your community

Overview

The landscape of community philanthropy is getting more crowded.

These days, community philanthropy — the practice of mobilizing financial and human resources on behalf of a community — can come in a wide range of forms and sizes. The most prominent community philanthropy institutions over the last century, such as community foundations, local United Ways, and religious organizations, are now joined by a host of other types of organizations, ranging from commercial charitable gift funds and place-based private foundations to identity-based funds and institutional giving circles, to name a few.

These community philanthropy organizations vary across many different dimensions. Some provide a broad set of services to their communities, while others specialize in just one aspect of community philanthropy, such as volunteerism, community information, or advocacy. Some of the organizations are locally based, while others are national or global in scope but provide services that reach local communities. And while many of the organizations are nonprofits, others may be governmental agencies or for-profit companies that benefit the community.

It's helpful to understand this crowded landscape in terms of the roles each actor plays in the community.

Understanding such a large and diverse philanthropic landscape in the abstract can be a daunting task. Looking at the *roles* that community philanthropy organizations play in their communities can be useful in understanding the landscape.

Through conversations with more than 200 community philanthropy organizations, the Monitor Institute has identified more than 45 different roles that community philanthropy organizations can play (see Appendix A for a complete list of roles). These roles — which range from grantmaking and managing transactions to developing the skills of local residents and facilitating community dialogue — can be grouped into 10 broad clusters:

- Expanding financial capital
- Deploying financial capital
- Financial and donor services
- Building capacity
- Engaging the community
- Sharing community information
- Aligning action
- Advocating
- Community planning
- Direct service and programming

No organization should try to play *all* of these roles. Rather, each community philanthropy organization needs to carve out the right set of roles based on their unique mission, goals, capabilities, and context. (For help in identifying which roles are most core or aspirational for your organization, we recommend using the [Prioritizing Roles](#) exercise included in the *What's Next* toolkit.)

And these days, given the increasingly crowded landscape faced by many community philanthropy organizations, it is more important than ever for them to see their own work in relation to the efforts of others in their community. Finding the most appropriate set of roles for your organization — as well as deciding what you should do relative to what others are doing, when you should partner or compete, and when you should find a unique niche versus joining with others to increase the scale of collective efforts — will require understanding how you fit into the local community philanthropy ecosystem.

This exercise is designed to help you better understand your local community philanthropy landscape.

This exercise provides a structured process for helping community philanthropy leaders better understand the local philanthropic context in which their organizations operate, by looking at the *specific roles* that other community philanthropy organizations are playing in their community.

We hope it helps you map your own community philanthropy landscape, make strategic choices about the roles you play in your community and how you relate to others, avoid unnecessary duplication of effort, and ensure that the most critical needs of your community are being met.

More immediately, the exercise prompts you to consider a range of critical questions:

- Are there roles you can let go of because others are already playing them well?
- Are there roles that you should consider prioritizing because they represent critical service gaps in your community?
- Are there potential partnerships you should explore to take advantage of complementary services?

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 to learn more about the *What's Next* toolkit and research methods.

Objectives



This exercise is meant to help community philanthropy organizations — their staff, senior leadership, and board — do three things:

- Develop a more comprehensive view of your local community philanthropy landscape
- Examine the overlaps and gaps in the roles played by your organization and other community philanthropy organizations
- Think strategically about your organization's relationships with others

Materials and setup

The exercise can be completed individually or in small groups of up to five or six people.

Because each person often has only a limited view of the larger landscape around him or her, doing the exercise together with others — from inside and/or outside of your organization — may help you develop a more robust and complete view of the local community philanthropy landscape.

To make this document easier to follow, we've indicated areas where instructions or discussion questions pertain to a single individual () or a group of individuals () who are completing the exercise.

To complete this exercise on your own, you'll need:

- The instructions (pages 4-5)
- The list of community philanthropy clusters and roles (Appendix A)
- The starter list of community philanthropy organization types (Appendix B)
- The Community Philanthropy Landscape template (Appendix C)
- The reflection questions (page 6)
- A space where you can quietly reflect

To complete this exercise in one or more small groups, you'll need:

- A copy of the instructions *per small group* (pages 4-5)
- A copy of the list of community philanthropy clusters and roles *per person* (Appendix A)
- A copy of the starter list of community philanthropy organization types *per person* (Appendix B)
- A copy of the Community Philanthropy Landscape template *per person* (Appendix C)
- A copy of the reflection questions *per small group* (page 6)
- At least one flip chart and markers for capturing group work
- A space where participants feel comfortable speaking up

The entire exercise (including the discussion of reflection questions) should take 60-120 minutes, depending on how thorough you want to be in your analysis of the ecosystem and how deep you want to explore other community philanthropy organizations working in your area.

Instructions

The Community Philanthropy Landscape template (Appendix C) serves as the centerpiece for this exercise. The template itself is made up of 10 half-page sections (refer to Figure 1 below) — one section for each of the 10 clusters of roles identified by the *What's Next* initiative (refer to Appendix A for a full list of clusters and roles). Each section provides a structure for systematically thinking about other community philanthropy organizations that play a specific cluster of roles.

If at all possible, we recommend completing the exercise for all 10 clusters, as this will provide you with a more complete picture of the local community philanthropy landscape. If this isn't possible, focus on a subset of clusters that are the most relevant or important for your organization. Either way, you may want to analyze only a handful of clusters at each sitting, as the brainstorming process can be tiring.

Whether completing the exercise alone or in a group, begin by having individual participants take about 3-5 minutes total to go through the first three steps on their own.

1. On the Community Philanthropy Landscape template, review the section that you have chosen to tackle first (e.g., on building capacity). Focus in particular on the numbered roles listed on the right-hand side of the section. In the table provided, brainstorm a list of all of the organizations that play those roles in your community. Try to think beyond the usual suspects to include other types of organizations that may not usually be included in conversations about community philanthropy. Err on the side of listing too many organizations, even if they are very specialized or only tangentially involved in the roles. (Refer to the starter list in Appendix B for ideas about types of organizations to consider.)
2. For each organization you identified in the first column of the table, list the specific role(s) it plays on the second column. To do this, refer to the numbers provided in the list to the right (e.g., in the figure below, the number 1 is used in place of the role promoting nonprofit organizational effectiveness). Some organizations will play multiple roles; list the numbers of all roles that apply.
3. When you are finished with the table, turn to the traffic signals under each of the numbered roles. Use these traffic signals to indicate how well the organizations you have identified, as a whole, play each role in your community (i.e., poor, fair, or well). The ratings you make are subjective, but they provide a quick way to compare various sections.

At this point, your template should look something like this:

Figure 1: Illustrative example of one cluster in the Community Philanthropy Landscape template

BUILDING CAPACITY: Strengthening the skills and capabilities of people, organizations, and communities

What organizations are filling this cluster of roles in your community in some way? Which specific role(s) are they playing?

ORGANIZATION	ROLE(S) PLAYED <small>(Use numbers from list on right)</small>
United Way of Whatsup County	1,2,4
Whatsup Chamber of Commerce	3
Whatsup community college business program	2,3
Whatsup community development corporation	1,2
Boys Scouts of Whatsup	2
Whatsup City Library	2

Roles that fall in this cluster:

1 Promoting nonprofit organizational effectiveness
Overall, how well is this role played?

Poor
 Fair
 Well

2 Developing the skills of local residents
Overall, how well is this role played?


Poor
 Fair
 Well

3 Growing local entrepreneurs and businesses
Overall, how well is this role played?

Poor
 Fair
 Well

4 Providing direct support to local government
Overall, how well is this role played?

Poor
 Fair
 Well

4.  If you are working in a small group, go around the table and have each participant contribute one item from his or her template (including both the organization and the specific role(s) it plays) until the list has been exhausted. Record these entries on a flip chart (making sure to title the flip chart appropriately). Take a few minutes to discuss the list as a group, adding to it as appropriate. (As an alternative, you may choose to forgo the individual work and have a group brainstorming session with one note-taker writing on a flip chart.) Finally, discuss each role in the cluster: how well does the aggregated set of community philanthropy organizations fulfill each role overall (i.e., poor, fair, or well)?
5. Repeat the steps above for each of the other clusters of roles, or just for the clusters you've decided to focus on.

Congratulations! You have now finished mapping your community philanthropy landscape. Go to the next section to reflect about the roles you should play and to explore potential partnerships.

Reflection questions

Below are lists of helpful discussion questions for the exercise. Allocate at least 30 minutes to think about the questions on your own or 60 minutes to discuss them with your small group.

First, look across the sections you've completed to assess the community philanthropy landscape as a whole.

- Look at the roles that aren't currently being played well in your community. For each role, consider the following questions: Is it problematic that this role isn't well played? Would it make sense for you to play this role or to help someone else to build the capacity to play this role?
- Now look at the roles that are currently being played well. For each role, consider the following questions: Are you also playing that role? Do you need to play that role? Are you coordinating with others that are playing that role?
- Based on your responses to the questions above, are there one or two roles toward which your organization might want to change its approach (e.g., stop doing or start doing or do differently) in the next six months?

Next, consider the organizations that play the roles you currently play and/or the roles you want to play more of in the future.

You may want to just choose a handful of roles that seem interesting to you, or you can use the [Prioritizing Roles](#) exercise from the *What's Next* toolkit to help you think more strategically about which roles are most important to you and your organization.

Review the sections of the Community Philanthropy Landscape template that correspond to roles you have prioritized (refer to Appendix A for a full list of clusters and roles). Search through the table in each section for organizations that play your prioritized role(s). Take 2-3 minutes total to answer the following questions about each organization:

- Have you ever worked with this organization before? How would you describe your relationship with them?
- What are they particularly good at doing? What are they not as good at doing?
- What resources do they bring to the table that you cannot? What resources do you bring to the table that they cannot?
- Are there activities or issues where you actively compete with them? Are there activities or issues where you could potentially partner or coordinate effort with them for mutual benefit?
- What are the next steps you could take either to build or improve your relationship with them?

Finally, revisit the organizations you have identified as potential allies and think about possible action steps.

- Which organization(s) might warrant further outreach, investigation, or action?
- Are there particular organizations that seem like natural allies or that complement your work well?

If it makes sense, prioritize the steps you would take to connect with organizations that seem like they'd make good partners for your organization.

Next Steps

This exercise can lead to several different follow-on activities, briefly described below:

- **Use your landscape map to help make strategic choices.**

- The **Prioritizing Roles** exercise can help you focus in on the roles that are most important for you to explore during the Landscape Mapping exercise. But the Landscape Mapping exercise can also influence your choices in the other direction too, helping you find a niche in the community by making you more aware of what others are doing. Once you've completed the Landscape Mapping exercise, revisit what you consider to be core, adjacent, and aspirational in your organization's portfolio of roles. Are there roles that you should leave to others? Are there critical gaps in the roles needed by the community?
- Use the analysis from the Landscape Mapping exercise to guide your outreach strategies. Select the five organizations that seem like they would best complement your work, and begin a conversation about how you might work together on a specific issue or project, or about how you can collaborate more generally.

- **Improve your view by doing the Landscape Mapping exercise with external partners.**

- People within your own organization may not have the best view of all aspects of the community philanthropy landscape. Try doing the exercise with a small group of leaders from other organizations to see whether they have a similar view of the landscape as you do. Ideally, the collective wisdom should improve everyone's understanding of what is happening in your community.
- Bring together the leaders of a number of other community philanthropy organizations in your area to develop a collective sense of the local landscape and discuss how you could work together. Begin the conversation by producing a map of "who does what" (and "who wants to do what") in your community. (Note: The more local leaders you involve in the exercise, the better the map will reflect all the activity going on in your community.)



- **Use the Landscape Mapping exercise as a starting point to help you think creatively about new ways to play selected roles.**

- If you found that participants were particularly interested in playing a particular role differently and/or in exploring a new type of partnership, bring together a diverse group to use the **Generating New Ideas** design to help you generate new ideas about how you can play those roles. 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.

APPENDIX A: List of roles that community philanthropy organizations can play

Expanding Financial Capital

- Educating the public about philanthropy
- Soliciting giving from local donors
- Soliciting capital from outside the community
- Deliberately attracting diverse donors
- Developing earned income to support social-purpose activities

Deploying Financial Capital

- Grantmaking to nonprofits
- Supporting individuals (scholarships, fellowships, etc.)
- Impact investing
- Directly connecting givers and recipients

Financial and Donor Service

- Managing investments/endowment funds
- Managing transactions for donors
- Educating donors about community issues
- Providing philanthropic advisory services
- Connecting local philanthropists with each other
- Co-creating initiatives with donors

Building Capacity

- Promoting nonprofit organizational effectiveness
- Developing the skills of local residents
- Growing local entrepreneurs and businesses
- Providing direct support to local government

Engaging the Community

- 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
- Mobilizing residents around issues

Sharing Community Information

- Researching community issues and public policy
- Compiling information about local organizations and available resources
- Spreading local news
- Tracking data about community well-being
- Measuring the outcomes and impacts of programs

Aligning Action

- Facilitating learning networks
- Coordinating funding and activities
- Building collaboratives
- Managing formal collaborations

Advocating

- Promoting specific organizations and interventions
- Influencing public opinion
- Influencing government and business priorities
- Lobbying for public policy change

Community Planning

- Facilitating urban/rural planning processes
- Promoting economic development planning
- Planning for disaster response and prevention
- Proactively planning for the long term

Direct Service and Programming

- Starting new nonprofit programs
- Managing direct service programs
- Designing government interventions
- Managing government programs
- Incubating social enterprises or businesses

APPENDIX B: Starter list of community philanthropy organization types

Each community has a unique set of community philanthropy organizations. However, most people only think about a small number of these organizations. To help open up your thinking, here is a list of some of the other types of organizations that may be doing community philanthropy work in your area. It is by no means comprehensive, but we hope it can prompt additional thinking about the types of other organizations that may be serving your community.

- Accreditors and ratings organizations
- Community development finance institutions
- Chambers of commerce
- Civic clubs
- Commercial charitable gift funds
- Community colleges and universities
- Community data aggregators
- Community development corporations
- Community organizers
- Conservation organizations
- Co-ops
- Crowdfunding platforms
- Crowdsourcing platforms
- Donor education service providers
- Giving circles (both formal and informal)
- Identity-based funds (e.g., Latino funds, gay and lesbian funds)
- Impact investing funds
- Issue-based funds (e.g., educational- or environmental-focused groups)
- Local economic development councils
- Local government (city councils, etc.)
- Local newspapers and magazines
- Nonprofit data repositories
- Nonprofit hospitals
- Nonprofit service providers
- Online engagement platforms
- Online giving platforms (including peer-to-peer lending platforms)
- Philanthropic advisory firms
- Political action committees
- Private foundations
- Private wealth management
- Professional advisors (e.g., lawyers, accountants)
- Professional trade associations
- Regional collaborations
- Religious organizations
- Tax advisors
- Think tanks
- United Ways (and other Federated Giving)
- Volunteer coordination offices
- ...

APPENDIX C: COMMUNITY PHILANTHROPY LANDSCAPE Template

Print out the following five pages, single sided and in color, and cut in half (lengthwise) to separate the two sections that are featured on each page.

Print one set per participant.

EXPANDING FINANCIAL CAPITAL: Increasing the assets available to support community change efforts

What organizations are filling this cluster of roles in your community in some way? Which specific role(s) are they playing?

ORGANIZATION	ROLE(S) PLAYED (Use numbers from list on right)

Roles that fall in this cluster:

- 1 Educating the public about philanthropy**
Overall, how well is this role played?

Poor Fair Well
- 2 Soliciting giving from local donors**
Overall, how well is this role played?

Poor Fair Well
- 3 Soliciting capital from outside the community**
Overall, how well is this role played?

Poor Fair Well
- 4 Deliberately attracting diverse donors**
Overall, how well is this role played?

Poor Fair Well
- 5 Developing earned income to support social-purpose activities**
Overall, how well is this role played?

Poor Fair Well

DEPLOYING FINANCIAL CAPITAL: Using monetary assets to support organizations, programs, and people

What organizations are filling this cluster of roles in your community in some way? Which specific role(s) are they playing?

ORGANIZATION	ROLE(S) PLAYED (Use numbers from list on right)

Roles that fall in this cluster:

- 1 Grantmaking to nonprofits**
Overall, how well is this role played?

Poor Fair Well
- 2 Supporting individuals (scholarships, fellowships, etc.)**
Overall, how well is this role played?

Poor Fair Well
- 3 Impact investing**
Overall, how well is this role played?

Poor Fair Well
- 4 Directly connecting givers and recipients**
Overall, how well is this role played?

Poor Fair Well

FINANCIAL AND DONOR SERVICE: Providing financial and philanthropic assistance to individual and institutional donors

What organizations are filling this cluster of roles in your community in some way? Which specific role(s) are they playing?

ORGANIZATION	ROLE(S) PLAYED (Use numbers from list on right)

Roles that fall in this cluster:

- 1 Managing investments/endowment funds**
Overall, how well is this role played?

Poor Fair Well
- 2 Managing transactions for donors**
Overall, how well is this role played?

Poor Fair Well
- 3 Educating donors about community issues**
Overall, how well is this role played?

Poor Fair Well
- 4 Providing philanthropic advisory services**
Overall, how well is this role played?

Poor Fair Well
- 5 Connecting local philanthropists with each other**
Overall, how well is this role played?

Poor Fair Well
- 6 Co-creating initiatives with donors**
Overall, how well is this role played?

Poor Fair Well

BUILDING CAPACITY: Strengthening the skills and capabilities of people, organizations, and communities

What organizations are filling this cluster of roles in your community in some way? Which specific role(s) are they playing?

ORGANIZATION	ROLE(S) PLAYED (Use numbers from list on right)

Roles that fall in this cluster:

- 1 Promoting nonprofit organizational effectiveness**
Overall, how well is this role played?

Poor Fair Well
- 2 Developing the skills of local residents**
Overall, how well is this role played?

Poor Fair Well
- 3 Growing local entrepreneurs and businesses**
Overall, how well is this role played?

Poor Fair Well
- 4 Providing direct support to local government**
Overall, how well is this role played?

Poor Fair Well

ENGAGING THE COMMUNITY: Helping residents connect and get involved in addressing local issues

What organizations are filling this cluster of roles in your community in some way? Which specific role(s) are they playing?

ORGANIZATION	ROLE(S) PLAYED (Use numbers from list on right)

Roles that fall in this cluster:

- 1 Facilitating civic participation and volunteerism**
Overall, how well is this role played?
 Poor Fair Well
- 2 Providing avenues for community input, ideas, and connection**
Overall, how well is this role played?
 Poor Fair Well
- 3 Facilitating community dialogue**
Overall, how well is this role played?
 Poor Fair Well
- 4 Strengthening social connections among residents**
Overall, how well is this role played?
 Poor Fair Well
- 5 Empowering resident decision-making**
Overall, how well is this role played?
 Poor Fair Well
- 6 Mobilizing residents around issues**
Overall, how well is this role played?
 Poor Fair Well

SHARING COMMUNITY INFORMATION: Generating and providing access to information related to the local community

What organizations are filling this cluster of roles in your community in some way? Which specific role(s) are they playing?

ORGANIZATION	ROLE(S) PLAYED (Use numbers from list on right)

Roles that fall in this cluster:

- 1 Researching community issues and public policy**
Overall, how well is this role played?
 Poor Fair Well
- 2 Compiling information about organizations and available resources**
Overall, how well is this role played?
 Poor Fair Well
- 3 Spreading local news**
Overall, how well is this role played?
 Poor Fair Well
- 4 Tracking data about community well-being**
Overall, how well is this role played?
 Poor Fair Well
- 5 Measuring the outcomes and impacts of programs**
Overall, how well is this role played?
 Poor Fair Well

ALIGNING ACTION: Coordinating efforts across multiple organizations to increase social impact

What organizations are filling this cluster of roles in your community in some way? Which specific role(s) are they playing?

ORGANIZATION	ROLE(S) PLAYED (Use numbers from list on right)

Roles that fall in this cluster:

- 1 Facilitating learning networks**
Overall, how well is this role played?
 Poor Fair Well
- 2 Coordinating funding and activities**
Overall, how well is this role played?
 Poor Fair Well
- 3 Building collaboratives**
Overall, how well is this role played?
 Poor Fair Well
- 4 Managing formal collaborations**
Overall, how well is this role played?
 Poor Fair Well

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

What organizations are filling this cluster of roles in your community in some way? Which specific role(s) are they playing?

ORGANIZATION	ROLE(S) PLAYED (Use numbers from list on right)

Roles that fall in this cluster:

- 1 Promoting specific organizations and interventions**
Overall, how well is this role played?
 Poor Fair Well
- 2 Influencing public opinion**
Overall, how well is this role played?
 Poor Fair Well
- 3 Influencing government and business priorities**
Overall, how well is this role played?
 Poor Fair Well
- 4 Lobbying for public policy change**
Overall, how well is this role played?
 Poor Fair Well

COMMUNITY PLANNING: Helping to guide the future development of various aspects of the community

What organizations are filling this cluster of roles in your community in some way? Which specific role(s) are they playing?

ORGANIZATION	ROLE(S) PLAYED <small>(Use numbers from list on right)</small>

Roles that fall in this cluster:

- 1 Facilitating urban/rural planning processes**
Overall, how well is this role played?

Poor Fair Well
- 2 Promoting economic development planning**
Overall, how well is this role played?

Poor Fair Well
- 3 Planning for disaster response and prevention**
Overall, how well is this role played?

Poor Fair Well
- 4 Proactively planning for the long term**
Overall, how well is this role played?

Poor Fair Well

DIRECT SERVICES AND PROGRAMMING: Designing, incubating, or managing services and programs in the community

What organizations are filling this cluster of roles in your community in some way? Which specific role(s) are they playing?

ORGANIZATION	ROLE(S) PLAYED <small>(Use numbers from list on right)</small>

Roles that fall in this cluster:

- 1 Starting new nonprofit programs**
Overall, how well is this role played?

Poor Fair Well
- 2 Managing direct service programs**
Overall, how well is this role played?

Poor Fair Well
- 3 Designing government interventions**
Overall, how well is this role played?

Poor Fair Well
- 4 Managing government programs**
Overall, how well is this role played?

Poor Fair Well
- 5 Incubating social enterprises or businesses**
Overall, how well is this role played?

Poor Fair Well

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