

# Strategic Philanthropy Roadmap



Leveraging private resources for the greatest, lasting public good.

Following the 8-step roadmap below will help you assess root causes of significant social problems; identify the full spectrum of possible solutions; vet and assess partners best advancing those solutions; and aim to achieve measurable, lasting, positive results for society.

*Before beginning the Roadmap, take time to identify your values, passions, and the top issues you care about as an individual or family to determine your vision and mission for your philanthropy.*

1

## DEFINE THE PROBLEM AND ITS ROOT CAUSES

What is the problem that you want to address?

- ◆ Why is it important/compelling to address to you? To society?

What do we know about:

- ◆ What is driving the problem and where the problem is rooted?
- ◆ Recent trends?
- ◆ What has worked/not worked in effectively addressing the problem?

What dimensions of the problem are not being addressed? Where are the gaps?

- ◆ Can you or a partner fill that gap in a value-added role?

2

## ARTICULATE YOUR GOALS RELATED TO YOUR VISION AND HYPOTHESIZE YOUR THEORY OF CHANGE

What do you hope to achieve? What is your vision of how the world will look if you succeed?

Determine your “if-then” theory: If we do x, then y will result.

- ◆ What building blocks are needed to achieve your goals/positive change?

3

## CONDUCT A FIELD SCAN TO ASSESS THE MARKET - MAP KEY PLAYERS AND STRATEGIES

Who else is working on the problem? What can you learn from them?

Which organizations and individuals are doing the best work? Can you partner with them?

Is there a need to establish a new organization to tackle the problem?

## 4

### CONSIDER THE LEVERS TO PUSH TO MAKE CHANGE

What must be done to move the agenda forward? What levers will create the most lasting change? Where should you intervene?

- ◆ Community? Consider placed-based, grassroots solutions
- ◆ Government? Consider public policy-based solutions
- ◆ Business? Consider market-based solutions

## 5

### CONSIDER APPROACHES TO ADDRESS THE PROBLEM AND ADVANCE SOLUTIONS

How can you best leverage your full financial capital mix?

- ◆ Through grantmaking or “philanthropic buying” including general operating or project support?
- ◆ Provide risk and growth capital to fund promising start ups?
- ◆ Capitalize on market forces through social impact investing and influencing companies to do good and do well?

How can you select from a range of philanthropic strategies and tools to achieve your goals?

- ◆ Amplify what works well by scaling and building the capacity of high impact, high potential leaders and organizations; fostering collaboration/collective impact?
- ◆ Catalyze innovative solutions by investing in social enterprises and entrepreneurs; supporting model building and testing?
- ◆ Influence public opinion and policy makers to adopt solutions through public awareness campaigns and targeted advocacy?

## 6

### CONSIDER YOUR COMPARATIVE ADVANTAGE: TIME, TALENT & TREASURE

What do you bring to the problem-solving table?

- ◆ Your expertise
- ◆ Your networks
- ◆ Your time
- ◆ Your financial capital

## 7

### **DEFINE SHORT- AND LONG-TERM PERFORMANCE MEASURES TO EVALUATE EFFECTIVENESS OF YOUR STRATEGY**

How will you determine whether you are reaching your goals in the short term (i.e., short term benchmarks) and in the long term?

Can you define measurable, incremental change in the next 3-5 years?

How can you define success that might take years to achieve?

If in the benchmarking you are not meeting your targets, how can you make mid-course corrections in your theory of change and strategy as needed?

## 8

### **SEEK LEVERAGE**

How can you attract the support of other funding partners/co-investors? How can you communicate success?

What are the best ways to disseminate information and learnings on your intervention? To improve the field?