

Scanning the Landscape

Assessing Needs and Finding Your Funding Niche

Scanning, a seldom discussed but powerful strategy for philanthropic impact, involves taking time to learn more about your community or a particular field to find out how your giving can be most effective. Scanning is doing intentional learning to be able to target your resources well.

Funders use scanning for two main purposes: to develop a giving focus and design their giving strategy.

Common ways to scan include talking with community leaders, experts, and citizens; engaging organizations you support in discussions; and reviewing written information published by practitioners, researchers, foundations, donors, and other experts. Scanning is an investment of time to become even more informed and better fulfill your giving goals.

Funders have the privilege and opportunity to talk with almost anyone in a community. Pick up the phone or send an e-mail, and you may well find that doors open for you. By reaching out and having such conversations, you're bound to learn a great deal.



Why Scan

Because the most effective giving goals are grounded in the donor's values and real needs, funders use scanning to discover priority needs, including those that are ignored. Funders often ask this key question: Which issues in my community or area of interest are most serious and most in need of attention? Choosing to address a significant problem or issue overlooked by other funders is a powerful strategy for impact.

Funders also use scanning to find out more about their chosen focus areas to design or refine their giving strategies. Through scanning, you can learn useful things including barriers to progress in your giving area, promising strategies, approaches that haven't worked, effective agencies and programs, public funding streams, potential collaborators, and opportunities to make a difference. This information helps you design and focus your giving strategy to more effectively bring about the changes you seek. Read on to learn about ways to scan and tips for success.

Ways to Scan

Scanning can be done in ways that fit your time, budget, and operating style. Some funders do one big scan to develop their focus. Others scan every few years. Some even scan a little bit once or twice a year to inform and refine their strategies. Scanning can be equally effective if your giving has a geographical focus or a topical one.

Donors scan the landscape in a variety of ways. Your approach can be adjusted according to your goals, whether to learn broadly about community needs and opportunities or to gain particular insights to design or refine your giving strategy.

"Better understanding leads to smart conversations, which, in turn, help you make decisions about your grantmaking. Scanning is really a winding path, and, although you may begin with certain ideas, you need to follow the directions in which the conversations lead. What we learn along the way helps us ask more pointed questions to get even more detail and inform the next set of discussions. Ultimately, our scanning helps us choose strategies that will have more impact."

—Carrie Schindele, Peter and Carmen Lucia Buck Foundation, New York, NY

Here are a few approaches you might take:

- Talk with people in diverse walks of life to find out what they're worried about or what opportunities there might be to strengthen your community or field of interest. Consider board and staff of nonprofits, social workers, university researchers, business leaders, government officials, journalists, teachers, parents, students, volunteers, recipients of social services, and selected organizations you currently support.
- During your conversations, ask, What issues are most in need of attention? What important problems are being ignored? These questions can help you identify a giving focus.
- If you've chosen a giving focus and want to design your giving strategy, ask, What approaches are working, and what isn't working? Who is doing the best work on the issue?
- Talk with program staff from local foundations and the United Way about their perspectives on community needs and priorities and effective strategies for particular issues. Achieve results and track impact against a few key measures, at least through basic means
- Call or meet with others funding in your focus area to learn the strategies they use and why, and what they've learned along the way. Ask what is working and not working, who is expert in the field, and which grantees are their favorites – and why. To find funders in your geographical area, connect with funder networks such as Exponent Philanthropy or your regional association of grantmakers.
- Many larger foundations publish valuable information about their goals, strategies, and grantees on their websites and in annual reports.
- To learn more about your focus area and how other funders are approaching the issues and opportunities, read materials produced by affinity groups, such as Grantmakers in Health and Grantmakers for Education, or by resource groups and associations that are expert in issue areas. Much of this information can be found via the organizations' websites, blogs, newsletters, and reports.

TIPS

- When scheduling phone calls and meetings with people in the community, be sure to make your purpose clear: You're talking with a variety of people to develop a better picture of issues or identify ways to address a particular problem. This will help set expectations for your talk.
- Set aside time to scan. Talking, reading, and learning takes time, as does making sense of what you learn. Your scanning might take place in several phases, each lasting a few weeks or a couple months. A first set of conversations often helps you develop even better questions to ask and surfaces the names of more people who can shed light on your particular inquiry.

Conclusion

Funders use scanning to develop a giving focus and design their giving strategies. The knowledge you gather helps you figure out where and how your valuable resources will have the most impact. You'll learn a lot about your field or community and gain surprising and invaluable insights.

A way to scan for potential grantees

Once you've identified the impact you want to make, spend some time scanning the landscape of your chosen field of interest. Get a sense for the range of organizations working in that field in terms of size, approach to the work, and specialties. If you want to impact your local community, then focus your scan locally.

Good ways to scan your field of interest include talking with local foundations, the United Way, and any knowledgeable organizations or individuals, such as university researchers, business leaders, government agencies, associations, journalists, and other donors and foundations. Make a list of potential grantees, and add to and update it as you scan.

Through your conversations, you will identify organizations that are particularly effective or have good potential. Keep in mind the level at which you wish to make change, so that you can consider and compare organizations that do similar work. For example, if you wish to support groups that advocate for greater access to quality early education, then you will want to focus on organizations that make advocacy part of their mission.

Your scan may also reveal useful information about which strategies are successful for accomplishing the work you care about. For example, you may hear from several informants that strategies x and y have been effective in helping at-risk teens complete high school, whereas strategies j and k have not been as successful. You can then scan for organizations using more effective strategies.

Once you've catalogued the organizations working in your field of interest (or a sample of the groups if your community is large), choose 5 or 6 groups to research in more depth. Consider both established groups and younger, smaller ones that could deliver higher impact with support and strengthening.

Additional Resources

Regional associations of grantmakers, Local or regional membership associations for grantmakers—a great resource for learning more about the funding needs of your local community and finding funders in your area who have similar grantmaking interests. www.givingforum.org

Scanning the Landscape: Finding Out What's Going On in Your Field, Ways to begin a scan, choose an approach, ensure diverse input, and analyze and use the results. www.grantcraft.org

What Makes an Effective Nonprofit, Fidelity® Charitable Gift Fund and Exponent Philanthropy, www.exponentphilanthropy.org.

About Exponent Philanthropy

Exponent Philanthropy is a vibrant membership organization that provides resources and valuable connections to help thousands of small-staffed philanthropists make the most of the minutes they have and the dollars they give.

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