PASSAGES ISSUE BRIEF

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EXPLORING KEY ISSUES IN FAMILY GIVING

Fast Forward to Greater Impact: The Power of Field Scans

By Christine Sherry

In days of scarce resources and seemingly endless philanthropic choices, family foundations and funds can frequently feel overwhelmed by options and unsure where to best place their philanthropic bets. Many funders wisely choose a focus area for funding, and then proceed to investigate—or be approached by—any number of apparently worthy organizations to support within that field. Most frequently, the questions that are asked are ones of organizational strength and track record: which among many groups are the best?

In This Issue:

While these are crucial questions for any funder to answer, this approach often leaves out a fundamental question: how do I know that the strategy I am pursuing is the one where there is real need, and where my philanthropic dollars are best utilized? How do I not re-invent the wheel, and how do I find strategies where my scarce dollars can be most highly leveraged? Assessing an organization as a stand-alone entity or even in comparison to others in the field begs the question of what the larger framework for funding should be and how a given strategy fits against the broader funding landscape.

Field scans are emerging as a core tool for family funders inundated by increasingly larger numbers of nonprofits seeking funding, the ubiquity of social media pitches, and an almost limitless amount of data available on the web—data which can be more overwhelming than useful. Field scans are particularly valuable for family foundations that want to try a new strategy, find partners, or leverage their assets. Amy Goldman, executive director of the GHR Foundation, says that field scans are nearly "essential" for any strategic grantmaker. This *Passages Issue Brief* explores what field scans are, the different types and purposes of scans, various models of design and methodology, and how such scans can be accessed, shared, and kept current. Several stories of family funders who have used field scans for impact are featured.

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A PRIMER ON FIELD SCANS AND WHY FUNDERS CONDUCT THEM

Field scans are tools funders use to look at a given field to see where the opportunities, needs, and gaps in funding lie. They range from informal phone interviews to learn about what others in your field are funding to more complex and structured studies carefully designed to provide a broad and detailed overview of where a given field has been and is going, where greater support is needed, and where efforts have missed the mark.

Field scans are conducted for many reasons. For funders new to a given field or region of funding, they help explain the terrain of existing funding, which aids in contextualizing the players, partners, and opportunities. For funders who have been working in a field for some time, they provide necessary updates and comparative data about ongoing developments and needs that may assist the funder in exploring new strategies or course correcting. Scans can help funders identify new needs in a field that they may have missed – and can help them to identify strategies which have been proven to be less than effective. Especially when conducted by outside parties, scans used in this way can provide valuable feedback to funders about what the nonprofits or communities they support really need but may feel are not being recognized. Field scans help family funders learn where a niche exists that may be right-sized for their funding dollars. This helps funders to understand where there is already considerable activity – which may mean that additional dollars may not be as highly leveraged – as well as where more learning is needed. Grantcraft has written an excellent guide to field scans, Scanning the Landscape 2.0, which explains many kinds of scans and shares stories of why funders undertake or commission them.

In a nutshell, funders use scans to form a bird's eye view of big picture trends, listen to the field, inform and engage others, keep fresh, and identify where target opportunities may lie. Done thoroughly and well, scans provide invaluable data about where funding gaps exist, where under-appreciated problems and organizations would benefit greatly from small amounts of support, and where a thoughtful grant can unlock a major opportunity that is as yet unrecognized. Scans can help inform a funder's position within a particular field, and hence promote more effective, targeted giving.

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Money Well Spent

Many newer funders or families initially react to the idea of scans as an unnecessary cost. Why not just get out, make grants in the areas you care about, and learn along the way? Wouldn't the money be better-spent giving money to deserving NGOs? Isn't it fair to assume that they know how to best spend the resources?

While these reactions are understandable, a great deal can be lost by failing to take stock of the big picture, either in the beginning of your philanthropic engagement in a field, or even periodically as a check to assess what others are doing, learning, and exploring.

Grantmaking without a context-based understanding of what has come before and where your field is going is often not as effective as it might be. Without proper planning and research, you greatly increase the risk of repeating the mistakes of others, or finding yourself faced with a variety of unintended consequences. Unfortunately, the field of philanthropy has historically done a weak job of commissioning and sharing these studies.

The Tow Foundation: Finding the Right Path from the Beginning

The Tow Foundation, a family foundation based in Connecticut, made a strategic decision in the late 1990s to focus part of its grantmaking on juvenile justice reform. In 1997, Emily Tow Jackson, the foundation's executive director and president, developed an interest in the issue through supporting a direct service provider in Bridgeport, Connecticut who identified the needs of youth in the juvenile justice system as a difficult but critical underfunded area. The foundation then began to examine the issue more closely and held a retreat in 1999 to learn more about juvenile justice reform. At that retreat, the board authorized a yearlong process to learn more about the issue. The foundation commissioned research, met with other funders working in advocacy, and studied the system, learning about the difference between parole and probation and becoming immersed in a topic that none of the board had previously worked in or knew deeply. Board members visited juvenile prisons and commissioned several roundtables to bring together groups from state government, the court system, service providers and others to speak with them, share their insights, and suggest ways the foundation could help.

This landscape and year of study launched what has become a fifteen-year, $12 million initiative that has led to an excellent return on investment. In that time, Connecticut went from having one of the worst systems in the country to becoming a national leader in reducing confinement. The foundation devoted considerable resources to engaging actively in advocacy efforts, partnered with major national foundations like MacArthur and Annie E. Casey, and helped position Connecticut as a national leader in evidence-based, family-focused treatments that improve the lives of youth while keeping the public safer.

Executive Director Emily Tow Jackson credits the initial year invested in studying the issue, identifying needs, and meeting with various groups in Connecticut engaged in juvenile justice reform with helping to launch the foundation on this path. "Our board and staff knew little about this issue when we started but we have a strong interest in social justice and wanted to focus our grants toward a population that had the greatest needs. Our entrepreneurial approach led us toward high risk, high need societal issues where we could potentially have a big impact. By educating ourselves deeply and building relationships with key decision makers, we were able to identify important entry points, find partners, roll up our sleeves and try different advocacy strategies. We then leveraged our investments by attracting national partners."

Fifteen years later, the Tow Foundation serves as a national model for how a small foundation can have big impact by catalyzing large-scale change in partnership with others on what many would view as an intractable problem. The results of this work can be viewed in a report just released by the Justice Policy Institute identifying the state as a national leader in juvenile justice reform.

As a result, NGOs and funders alike unwittingly spend money on projects others have already done. This can result in the funding of duplicative programs and wasted money in the long run.

Hedging Your Bets: Time and Costs Vary Widely

The time and costs of field scans can vary dramatically depending on the type of scan, the scope of research, and the issue that is being examined. Funders should view the scan as a portion of their overall investment in a funding area. Therefore, the amount of money and time that is spent on the field scan should be proportionate to the overall investment the funder plans to make. If a funder is making a small grant, they may consider conducting a quick, low budget survey to see what other funders are doing and to refine their strategy. This type of survey can be prepared by foundation staff members in as little as a day or two and the results can be compiled fairly quickly.

Convenings can be informal and involve only one or two local colleagues. They can also be considerably more extensive gatherings with numerous presenters and greater planning and travel costs. If a funder is planning to make a much larger investment in a brand new funding area, a more comprehensive scan conducted by an outside consultant may be appropriate. Comprehensive scans can vary in cost from tens of thousands of dollars to a hundred thousand dollars or more for a large, multi-party scan of a complex field. The cost depends on factors such as the initial research agenda, the complexity of the issue, the number of organizations engaged in the space, and the number of interviews required. The time, scope and budget of any scan should be individually negotiated.

In the field of business, conducting an informed market analysis is fundamental. Investors rarely fund startups without understanding market trends, competitors, and gaps. Making a major investment without that assessment would be foolish. But in philanthropy, while we may ask, "who is the best in the field" or "what NGO is really cutting edge," we often do so without creating the framework to learn the ecology and trends in a field and how one organization's work fits into the big picture. If a well conducted scan costing no more than a single grant to one grantee can unlock answers to those critical questions, it would save the donor and the field substantial amounts of money in the long run. No matter how small or large a foundation is, its contribution to the grantmaking community can be profound when it helps us all understand what contextualized, thoughtful, and strategic giving in a field might look like.

SCAN DESIGNS AND METHODOLOGIES: OPTIONS FOR FUNDERS

Field scans take many forms, from informal conversations to in-depth studies. The following is a brief summary of different design scans and methodologies. See the chart on page 10 for a summary of information on costs, advantages, and disadvantages of each approach.

- **Interviews:** For an experienced funder looking to check in with other collaborators, scanning can be as simple as regular phone interviews to learn what other colleagues are doing and to compare notes. Although many program officers and foundation staff do this as a matter of course, these kinds of regular interviews are more difficult for those who work solo or who are managing multiple priorities. Foundation staff may have general familiarity with what others are funding but often are vague on the details and do not keep up with changes in other foundation priorities as much as they might like.

While inexpensive and helpful to the individual foundation or donor, informal scanning through interviews rarely allows for sharing or building deep wisdom and perspectives about a given field: the results of these interviews are typically not shared with others, including new funders who might deeply value access to this information.

Informal conversations with other funders alone can be useful but also may miss the chance to hear from grantees and communities. In order to gather information from grantees, it may be preferable to have an outside source to allow grantees to express concerns they would not otherwise express to a funder. For example, The Planet Heritage Foundation hired an outside consultant to conduct a field scan exploring the intersection between climate and security *(see page 8 for more details)*. The consultant interviewed many leading experts and NGO leaders, who often had very important insights to share with funders that they felt they had not been able to communicate previously.

- **Surveys:** The easiest and most inexpensive written scans often involve short surveys sent out to funders and/or nonprofits, seeking to learn what they are funding and learning. Many surveys identify particular funding areas within a field, and ask both funders and grantees to indicate and elaborate on which of those sub-areas they are actively working on. This is important because it allows us to examine a field more closely, and to better understand where and how resources within a specific field are distributed. Surveys can also give nonprofits the opportunity to share their reasoning for various strategies and theories of change; one caution is that it may be difficult to do follow-up checks on the results of survey scans to assess the efficacy of those strategies and whether they should continue to be funded.

- **Review of Philanthropy Resources:** Scans may also be conducted informally through consistent review of regular alerts from philanthropy news sites and research databases. The Foundation Center gathers excellent materials and presents reports like Arts Funding Watch on a regular basis. They also provide services like IssueLab, a site that provides free access to thousands of materials specifically addressing questions in the social sector, including existing field scans. In addition to IssueLab, the Foundation Center has useful factsheets that summarize the destination of grant dollars through various filters, such as issue area and geography. Finally, using social media to keep tabs on trends identified by other funders and nonprofits, or to crowd source responses to a theory or proposed strategy, can be an inexpensive—if informal—way of staying abreast of a field.

- **Focus Groups and Convenings:** Hosting meetings of key stakeholders can be a useful strategy for exploring new trends in a field. These meetings can be useful in gathering perspectives from multiple players and quickly gathering the intelligence of a group. The downsides can be that such sessions can involve subtle competition among nonprofits to pitch their favorite causes and may reward those who are most vocal, leaving behind those whose ideas may be equally valid. Depending on the size of the convening, this approach can also be more expensive to organize and manage—but the benefits can be well worth the cost!

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- **Visual mapping:** In recent years, there has been a proliferation of fee-based mapping tools that use data visualization. One well-known example, Philanthropy In/Sight, is a service of the Foundation Center (*see Figure 1, below*). It is an interactive mapping tool that combines data on funders and nonprofits with Google maps. It allows users to overlay grant and geographic data with 150 datasets that include, among others, demographic and socioeconomic information. Visual mapping seeks to tell an interactive story of philanthropy in any given region, issue area, or target population by combining rich data with filters that literally produce a 'lay of the land.' By mapping both grant makers and grant seekers, a funder could use these tools to have a more sophisticated understanding of how to position itself and its grants among an almost impossibly faster growing network.

  Another visual mapping tool, the Strategy Landscape, was created by the Monitor Institute and launched in partnership with the Center for Effective Philanthropy in 2010. Born out of the need to facilitate collaboration among funders, the Strategy Landscape seeks to illustrate evolving support for a field or initiative by creating an interactive tool that makes it easier to uncover insights within funders' collective actions and knowledge of various fields. Although still in development, this tool promises to give participants the ability to visualize the work that is being done across programmatic areas by answering the who, how, and where questions of funding. The pilot project involved ten funders in climate change topics, and has compiled information and financial data for the entirety of their climate change programs. The result, which is a sample of what will eventually be created for a variety of program areas, breaks down grantmaking in climate change into a variety of sub-categories, which are then sortable into finer sub-areas. The number of grants and their size are represented by the size category/grantee within the map (*see Figure 2 on page 7*).

Figure 1: Demo Philanthropy In/sight. Source: The Foundation Center

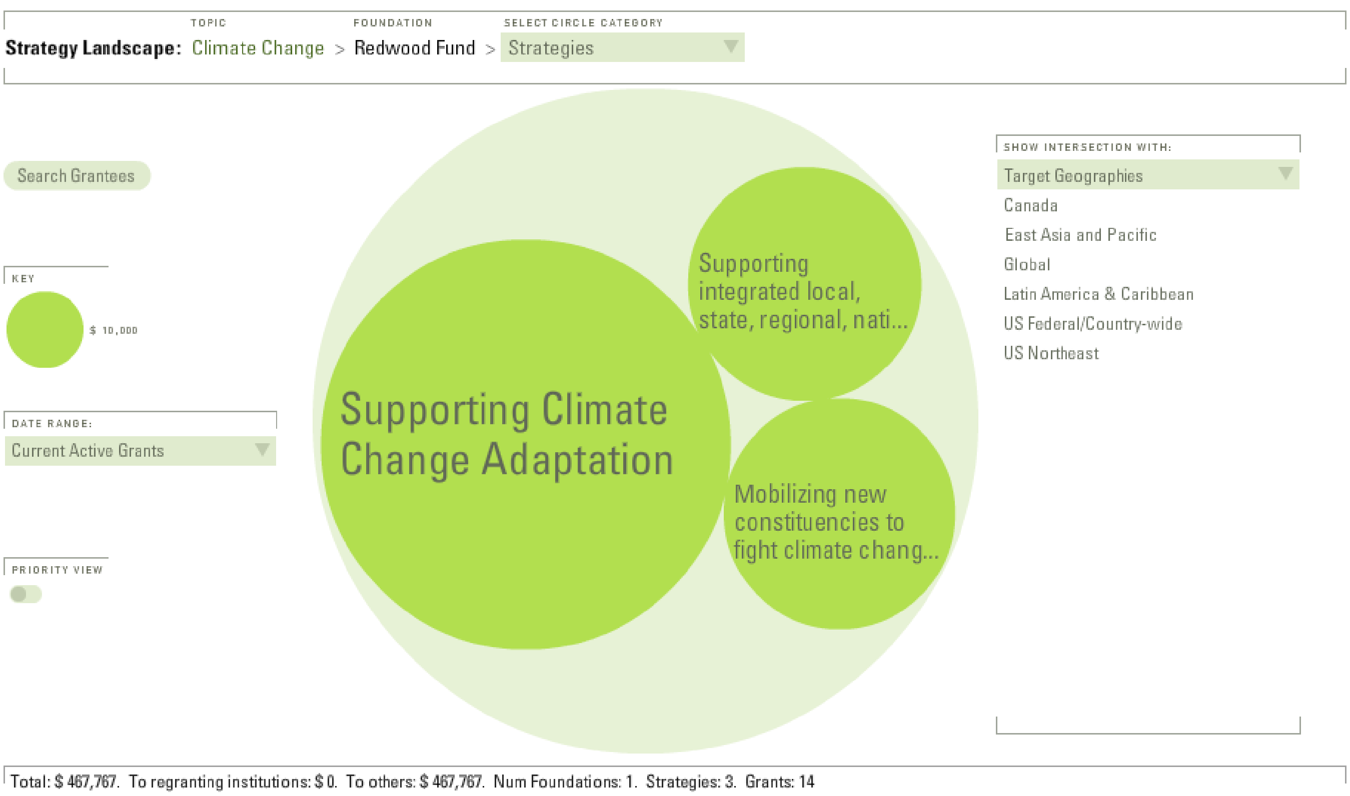
While these visual mapping platforms can be an indispensable resource for conducting a scan, they risk telling only part of the story. Though the size, location, and other data related to funding in a given field might be clear, the need to understand the successes and failures of both grantmakers and their grantees often goes unaddressed. The latter is crucial to continuously enhancing philanthropy practices, and why more truly comprehensive scans are needed.

- **The Comprehensive Scan:** With increasingly more family foundations and individual donors entering the field, there is greater need for comprehensive scans that can be shared across and among foundations and individual donors. For a family foundation truly interested in leveraging its long-term impact in a given field, a comprehensive scan may be the way to go.

Comprehensive field scans can start with a literature review of the existing funders, NGO's, and leading writings in the field. Most scans can build on existing mini-surveys created by other foundations, affinity groups, academics or other experts; rarely does one start with a clean slate. A survey of the leading funders and their programs is often a second component; ideally, the scan goes beyond identifying the grantees to explore why the foundation chose the strategy it did. A literature review can also identify key nonprofit leaders, reports, and other background materials.

What is least frequently undertaken—but often most significant—is a fuller analysis of what has worked in the field, as well as gaps, areas of needed funding, and collective self-assessments of where and how the field should evolve to maximize funding opportunities. These are often subjective assessments, but extensive 360-degree style interviews with multiple stakeholders can surface key themes and areas of agreement, even where opinions may vary.

Figure 2: Demo, Climate Change Grantmaking. Source: Monitor Institute



Comprehensive scans also typically involve informal interviews with experts outside the field of philanthropy, including academics, journalists, government employees, think tanks, and independent researchers. These conversations help identify and build relationships with the most helpful, knowledgeable individuals and entities in a specific field, and enhance the overall knowledgebase by providing a more critical overview of existing work. It is this synthesis of trends, successes, and failures that distinguish a truly comprehensive scan from a listing of funders and grantees. These efforts can yield significant benefits.

Comprehensive Scan Case Study: The Planet Heritage Foundation

Several years ago, the Planet Heritage Foundation, a private foundation established in 2008 by Addison Fischer and Cindy Mercer, commissioned a scan of funding needs and opportunities at the intersection of climate change and national security. As a relatively new foundation, Planet Heritage was interested in exploring whether there was a need to support fundamental research in the intersection of these two ideas. The scan began with an extensive literature review that revealed that the idea of encouraging fundamental research was less important than other issues, including translating existing research into the policy arena.

The second phase of the scan involved detailed conversations with more than 20 experts from the United States and abroad. Researchers and funders who had examined the link between climate change and security, or who were at least intrigued by it, were grateful that a new funder was systematically looking at the field and asked to see findings of the scan. Many researchers and a few of the long-time funders in the field knew vaguely of work others had done, but they didn't have a larger picture.

Planet Heritage learned that only relatively modest amounts of money had been invested in this particular subset of the climate change space. The scan pointed out a true funding gap; for small amounts of money, important but underfunded groups could do powerful, needed work.

Six months after launching the field scan, Planet Heritage published a report, "Climate Change and National Security: A Field Map and Analysis of Funding Opportunities." The report was discussed by national funding groups, provided briefing materials for leading organizations in the field, and quickly found its way into major policy circles. The report identified where there was consensus and disagreement in the field, and continues to provide a valuable roadmap to funders and analysts alike.

Scans Help Leverage Investments

"Planet Heritage engaged a consultant to do a scan because we knew we did not have the staff, time, or expertise to conduct it in house. While that required an up-front investment, we ultimately saved a great deal of time and resources by avoiding a plan that would have been redundant. In the end, the scan paid for itself many times over.

"The scan allowed us to understand the leading players and emerging issues in this field, and we were able to make a few key grants where we believed there could be considerable leverage. By sharing the scan with the broader field of funders and others engaged in the issue, we felt grateful to be able to contribute to an important conversation and learning within the field. We see that contribution as at least as valuable as any individual grants we made."

—Cindy Mercer, Co-Founder and Vice President of Planet Heritage

Comprehensive Scans: Additional Examples

Another scan, commissioned by the Schmidt Family Foundation, was designed to analyze the aftermath of post-earthquake funding in Haiti. The scan identified where popular interventions were working, where others were not, and where a donor could tackle an issue's origins rather than just treat symptoms. The Haiti scan revealed how money spent on certain health interventions actually ended up having negative overall impacts on the health sector; in some cases, the infusion of free healthcare undercut the services provided by domestic Haitian hospitals and forced many to declare bankruptcy.

The scan also revealed that despite more than $4.5 billion of aid money that flowed into Haiti, there were many NGOs doing duplicative work, while at the same time there were underfunded areas like youth-focused professional development and rural agriculture begging for money. Perhaps more aid to agricultural reform programs could have addressed the enormous problems of displaced persons who fled to or stayed in cities. The scan gave great insights into how philanthropy first and foremost should "do no harm."

What might have happened if such scanning were more widely available even a year after the quake when considerable funding dollars were still flowing in? The tendency to act quickly is particularly strong in disaster response fundraising, where those organizations with strong name recognition are able to attract significant amounts of money. But such patterns miss opportunities to support more innovative and local solutions. There were deeper needs that went unnoticed in the haste to move so quickly.

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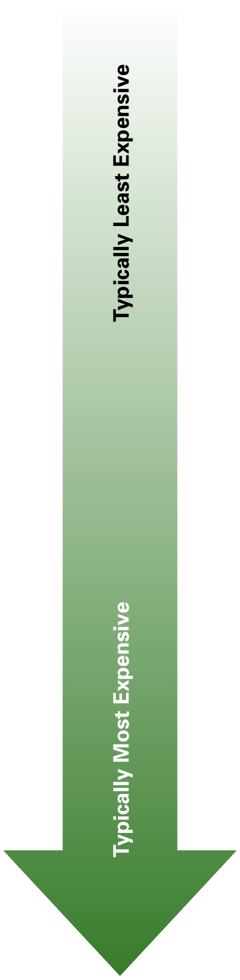
Similarly, a scan was commissioned to understand the funding opportunities in the Democracy Republic of the Congo, a country devastated by conflict since the late 1990's. With over $450 million flowing into the country in 2011 alone, the need to assess where additional dollars would have the largest, most lasting impact had never been greater. The Schmidt Family Foundation supported a scan to examine opportunities for investment in the DRC. While based on current funder activities, the scan was also informed by more than 50 international expert interviews and extensive literature review. This research uncovered stronger institutions as the fundamental need within the DRC, in both the state and civil society. The most viable methods to build them included security sector reform, journalism support, and training programs for the next generation of leaders, especially women. Such field scans open up an important dialogue among grantmakers about how to move from funding solely incremental, band-aid efforts, to taking a step back to analyze how they can support initiatives that are uprooting the sources of conflict and need.

The Benchmarking 2012: Trends in Education Philanthropy series commissioned by Grantmakers for Education is another example of a comprehensive field scan that goes beyond listing grant makers and grantees. The report compiles best practices and successful strategies in education funding to deepen the collective knowledge of education grantmaking and identify innovative funding opportunities, with special attention to emerging trends and strategies in the field. The scan draws from a survey of GFE's member organizations, which gathered not only basic information but also key learnings and insights from grantmakers across their wide range of areas and strategies in the education field.

An important component of GFE's scan is that it incorporates an analysis of how external trends, such as changing demographics and technology innovation, might affect the internal trends identified in the report. As Chris Tebben, executive director of GFE, explains, the goal of gathering and analyzing the funding data is to "help each other better understand the bigger picture, reflect on our practice and continuously strengthen the impact of education philanthropy." Through this and other comprehensive scans like it, funders have resources to assess how emerging global trends affect the impact of their giving, and how to identify those strategies that are most successfully adapting to a changing funding ecosystem. In education grantmaking, for example, understanding the gaps and opportunities in technology innovation and its education applications is increasingly, and exponentially, more important.

Advantages and Disadvantages of Field Scan Techniques



Field Scan Technique	Cost Factors	Advantages	Limitations and Disadvantages
Phone Interviews	• Staff time • Size of interview pool	• Fast, immediate feedback • Creates personal connections • Allows for nuanced input	• Difficult to share learnings • Limited scan • Not systematic
Surveys	• Complexity	• Minimally time consuming to send out • Good for gathering basic data	• Response rate can vary dramatically • May not capture nuances
Focus Groups/ Convenings	• Size • Length of meeting • Travel required	• Gather real time feedback from multiple stake holders • Can actively engage the family board in learning opportunities	• Can involve subtle competition and pitches • Can be expensive to organize and manage
Visual Mapping Tools	• Prior existence of platform • Ongoing data collection • Maintenance costs	• Can provide real time interactive feedback on the lay of the land	• Very expensive to create and keep current • May not be customized to fit your priorities/ interests
Comprehensive Scan	• Scope • Can be shared among funders	• Provides "best of both worlds"	• Need to define limits of scan • Can be costly and time-consuming to create and keep updated

USING FIELD SCANS TO FOCUS YOUR GRANTMAKING

Katherine Lorenz, president of the Cynthia and George Mitchell Foundation, has long been a strong proponent of field scans. "Scanning is all about looking out to find out who is doing the best work. Sometimes family foundations already have relationships with grantees and just fund those they know. But scanning can help focus a foundation on how to do what you want to do more effectively and learn about others who might be more effective grantees." Lorenz acknowledges that this can occasionally create tensions between families and staff if the family feels that their relationships might be disrupted. However, done right, scanning can help families develop more robust strategies with greater impact and still be included.

In Lorenz's experience, scanning can often be effective by simply talking with many people in the field. As a former staffer with The Philanthropy Workshop at the Institute of Philanthropy, Lorenz was responsible for doing research on site visits to different countries. The process of interviewing 100 people over 50 hours often led to strong insights into the key philanthropic needs and issues in a given country. Mitchell acknowledges that while you can't always spend that much time on a scan, the basic advice remains that you should "talk to as many people as you can."

When she took over the lead in her family foundation, she also spent a year canvassing the field, learning from others, and refining their grantmaking strategy. "Sometimes a scan doesn't need to be formal, but going out to the field and asking a lot of questions can help teach you where a $25,000 investment can be as or more effective than a $100,000 one."

FUNDING SCANS IN COLLABORATION: SHARING COSTS, BUILDING PARTNERSHIPS

Many family foundations express concern about the potential costs of an in-depth field scan, and if costs are a potential barrier, it is worthwhile considering funder partnerships that may include several like-minded funders, to co-fund such analyses. With the cost divided among various funders, the price of a scan is rarely prohibitive. Collaborating in this way also provides an opportunity for funders to explore other ways to work together and to share practical approaches and potential strategies with others. Finally, collaborating on a scan may be an attractive approach for inviting other funders to join in a promising new area of philanthropic opportunity.

The Needmor Fund, based in Ohio, makes grants in the area of social justice and community organizing. According to Needmor Fund Executive Director Frank Sanchez, the foundation actively participates in a number of affinity groups to share knowledge and learn together. As an active partner in the Funders Committee for Civic Participation, for example, Needmor participated and helped to fund a study of integrated voter engagement. By serving on the steering committee of FCCP and sharing the costs of a scan with four other funders, Needmor was able to leverage its investment with those of other, larger funders to learn more about needs in the

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The GHR Foundation: Developing Strategies Grounded in Reality

The GHR Foundation is a family foundation based in Minnetonka, Minnesota whose work focuses in part on interfaith, peace, and global children's issues. GHR had supported grantees in this field starting in 2009 through its Muslim-Christian Common Action (MCCA) initiative. Beginning in late 2011, GHR undertook several field scans to examine how it could pursue "positive disruption" with its interfaith grantmaking. Working with a consultant, GHR developed a typology of institutions working on interfaith issues. GHR staff, including an advisor who had previously worked for a MCCA initiative grantee, also started a year long exploration of the field, including meetings and outreach to past grantees, other funders and other partners to bring in outside perspectives on who was doing interesting, complementary and strategic work. The goal was to identify transformative, entrepreneurial work that could create significant change.

In March 2012 the Board held a retreat in New York City with two panels of grantees and others who were knowledgeable about the field to help the board understand the landscape, explore possible strategic paths forward, and articulate clear goals for the initiative. Among the questions addressed was how to best engage leaders and communities that do not naturally collaborate across faith lines so that they can build new relationships by tackling shared challenges. An earlier grant had gone to support work by the Nigerian Inter-Faith Action Association, a project that a current GHR staff member had previously led, which brought together trusted religious leaders in Nigeria to address malaria and other social problems. GHR wanted to identify scalable programs with other groups where social cohesion could be advanced through interfaith collaboration on issues of shared concern, and to pursue this aim within a strategic framework that would maximize long-term impact.

The goal throughout this process was to ensure that the board would be engaged, excited, and willing to support the strategy over a multi-year period. As part of this inquiry, staff undertook a scan of what other foundations were doing in this area. By September 2012, GHR had completed this initial landscape, had set forth a strategy for the renamed Inter-Religious Action initiative that the board approved, and had identified a number of potential grantees whose work would fit the new criteria. Importantly, the yearlong process provided numerous opportunities to solicit and integrate board members' input. In the end, GHR achieved its preliminary goal, which was to work with the board to create a multi-year grantmaking strategy to address real-world development problems with an interreligious lens. Significant new grants to Religions for Peace, Catholic Relief Services, and Mercy Corps followed.

Amy Goldman, the executive director of GHR Foundation, strongly suggests that field scans are "pretty much essential for being a strategic grantmaker." Continues Goldman, "We are concerned that every grant dollar have the highest impact. We tend to fund in areas where there are fewer funders and to take on complex problems. Doing a scan helps build our internal capacity to know the field and to develop a strategy that we can follow over a five- or ten-year period."

Goldman goes further, however, to encourage family foundations to use the scanning process as part of a larger knowledge management purpose. "As funders, we sit on a privileged perch. We have access to a lot of information and with that knowledge comes accountability. We have so much more to share than just our grant dollars, and there is so much we can contribute to the field by disseminating what we learn."

Goldman hopes that the GHR Foundation and other family foundations can help share the lessons from scanning and evaluation with others to serve as a roadmap, and that sharing the results of scans and convenings can lead funders not only to be more effective but also be more accountable.

field. Needmor also recently participated in a group scan with other funders interested in social justice funding in Southern states and another scan looking at congregation based organizing.

"One reason we participate with our time and dollars in these affinity groups is to get access to excellent studies commissioned jointly with other funders. As a small funder we can't commission a study by ourselves but we can learn a lot by sharing the cost with others, " says Sanchez. " We are constantly scanning what is going on in our fields, both with other funders and when we travel and do site visits. Scanning is built into our DNA; it allows us to be better grantmakers and gives us a broad understanding of emerging opportunities and needs. "

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CHALLENGES: KEEPING CURRENT, GOING PUBLIC AND MANAGING EXPECTATIONS

Three challenges often arise when more comprehensive scans are undertaken:

- **Keeping the information current.** To the extent that the scan can be made public and the costs shared, the scan can be kept current by short periodic updates or a wiki style effort for others to share updates.

- **Managing sensitivities of any new information that is made public, particularly information that is critical of prior efforts.** Unfortunately, while many comprehensive scans have been commissioned over the years by larger foundations, they have typically not been shared publicly for a variety of reasons. Sometimes a foundation does not want to signal its interest in entering a new space for fear of creating expectations about funding opportunities before a commitment is made to enter a field. Other times, the funder fears criticizing other funders' efforts or consultants do not want to publish their reports. Some funding circles of individual donors or wealth advisory groups commission scans but keep them proprietary to their clients. This challenge can be addressed by having both public and private versions of a scan, where certain highly sensitive information can be kept confidential but the remainder published in some form. As a sector, we need to become more comfortable in being willing to challenge projects and programs that are less than fully successful. A recent article in the *Chronicle of Philanthropy*, "Some Nonprofit Leaders Ask: Is Philanthropy Killing Itself With Kindness?," prompts those in the nonprofit sector, and its funders, to ask one another tough questions and have the courage to both criticize and accept criticism.

- **Managing expectations.** Many funders are reluctant to share scans if they are not sure they will proceed to fund in a given area. While such concerns can be valid, there are still ways of explaining the fundamental findings of the scan while acknowledging the funder's prerogative to elect to move forward or not and thereby not losing the useful material gathered and analyzed. In the long run, many more philanthropic dollars can be targeted more effectively, even if the original funder elects not to proceed in the direction initially envisioned.

SECOND THOUGHTS: WHAT IF A SCAN LEADS TO THE DECISION NOT TO FUND?

Occasionally, after conducting a field scan, a funder my elect not to fund in a certain area at all. The funder may conclude that their resources do not match the scale of the problem they are trying to address or that the strategy they would need to pursue to make an impact on the problem is not aligned with their overall mission and direction.

For example, a foundation might want to explore access to mental health services for underserved youth. They commission a scan to get a better sense of the field, what is being funded, and what strategies have yielded the best results. The scan reveals that the strategy that will make a significant impact in helping youth get access to mental health services is to fund mental health advocacy and policy reform. Knowing this, the foundation may decide that they are not going to fund in this area after all because they are reluctant to fund a policy strategy or don't feel as though they have the right staff in place to do so. This outcome does not mean that the exercise of conducting the scan was a failure. Field scans are meant to uncover information that was not previously known or clearly understood and the knowledge that is gathered by a scan is still useful and informative both to that foundation and to other funders who may be interested in a similar area.

CONCLUSION: CREATING A FRAMEWORK FOR INCREASED IMPACT

Field scans of all types help funders stay current and avoid reinventing the wheel, and can be extremely helpful to new and smaller family foundations because they provide a strong strategic framework to increase impact. Of particular value are more comprehensive scans that move beyond a list of "who funds what" to analysis of effectiveness and gaps. Co-commissioning and sharing such findings, in whole or part, can help to foster honest discussion, encourage collaboration, minimize redundant funding, and improve decision-making. Comprehensive scans require an upfront investment and time to keep updated, and a scan alone will not invariably lead to better funding outcomes. But well designed and executed scans shared more broadly can point the way to better use of foundation dollars overall.

ADDITIONAL RESOURCES ON PHILANTHROPIC FIELD SCANS

Articles and Reports

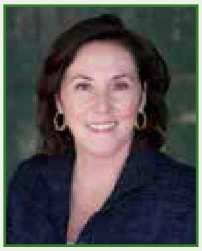
- Scanning the Environment for Philanthropic Best Practice Systems, Foundation News & Commentary, 1999.
- Scanning the Landscape 2.0: Finding Out What's Going On in Your Field, Grantcraft, 2012.
- Stop Funding Duplicative Projects, *Stanford Social Innovation Review*, 2013.

Websites and Tools

- IssueLab, The Foundation Center
- Philanthropy In/Sight, The Foundation Center
- The Strategy Landscape, Monitor Institute

Examples of Philanthropy Field Scans

- The Benchmarking 2012: Trends in Education Philanthropy, Grantmakers for Education, 2012
- Climate Change and National Security: A Field Map and Analysis of Funding Opportunities, Sherry Consulting, 2009
- Impact Investing Field Scan: Landscape Overview and Group Profiles, The Tides Foundation, July 2011
- Philanthropy in a Changing Society: Achieving Effectiveness Through Diversity, Rockefeller Philanthropy Advisors, April 2008.
- Tracking the Field, Volume 3: Exploring Environmental Grantmaking, Environmental Grantmakers Association, February 2012.
- Youth Organizing Field Scan, Funder's Collaborative on Youth Organizing, 2010.



About the Author

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The National Center for Family Philanthropy is the only national nonprofit dedicated exclusively to families who give and those that work with them. NCFP provides the research, expertise, and networking opportunities necessary to inspire our national network of giving families every step of the way on their philanthropic journey. Families learn how to transform their values into effective giving that makes a positive and enduring impact on the communities they serve. *Together, we make great things happen.*

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