

Worksheet 1: Philanthropic Strategy

Use this worksheet to develop your philanthropic strategy—your roadmap for being more intentional with your resources and impact. Most donors will use it to outline a grantmaking program, but the ideas can be adapted for scholarship or prize programs or for finding impact investments. Take time to reflect on these questions about your philanthropic strategy, using these tips:

- It is OK to skip questions that don't feel applicable or to mark them for future research and discussion.
- Create a different worksheet for each Social Impact Goal or philanthropic priority.
- You may need to refer to NCFP's [Philanthropic Purpose Primer](#) for the values and priorities you've established, [Governance Primer](#) for the decision-makers you want to involve, and [Impact Vehicles and Structures Primer](#) for the resources and vehicles you plan to use.
- Consider the worksheet an internal document that you can share with other decision-makers and advisors in your philanthropy.

1. Social Impact Goal

To what vision of progress or success do we hope to contribute?

(e.g., the improvement or preservation of a priority population, place, issue, or ideal)

How does this goal connect with our values and principles or documentation of donor intent

2. Context

What are the most important trends and data to monitor in this goal?

What stories and experiences influenced our choice of this goal?

Who are the most important partners to help us improve our understanding?
(e.g., certain groups with first-hand experience, experts, grantees, funders, or civic leaders)

What approaches to progress in our goal seem most important to support?

2. Role

Impact Tools: What impact tool(s) will we use to achieve our goal?

- **Vehicle** = name of a donor-advised fund, family office, 501(c)(4), or other vehicle. It could also be your personal checkbook or time. The same vehicle might house multiple tools.
- **Impact Tool** = grant program for nonprofits, award program for individuals or businesses, or impact investment program
- **Uses of Treasure** = a budget range in dollars and/or a percentage of a budget as best as you can determine.

Vehicle	Tool	Uses of Treasure	Other Notes

Along each continuum below, place a dot or asterisk that best represents how you will prioritize the opportunities for funding you'll review. Check "no preference" if you don't have one yet.

Timeframe:

←-----→

Make a bigger impact now Spread impact over time Make a bigger impact in the future

No preference

Scale of impact:

←-----→

Make a significant difference in the lives of a few people Help a large number of people, but less impact per person

No preference

Stage of funding:

←-----→

We're first money in to help leverage other donors We're part of a group of donors We're backing a proven partner, closing the final gap

No preference

Type of funding:

←-----→

General support; trust the partner to do what is right with the money Restricted funding; trust my ability to define the right uses of money

No preference

Risk:

←-----→

Low-risk funding; safe choices and assurance all money will be used as planned Smart-risk funding; take chances on promising ideas and people even if things might go awry

No preference

Amount of funding:

←-----→

Small amount; ensure recipient uses a diverse set of revenues even if it slows or diminishes success Large or 100% of the budget; ensure quick and successful implementation

No preference

Length of funding:

←-----→

One year or less commitment; give ourselves flexibility Multi-year commitment; give the partner flexibility

No preference

4. Impact Process

Use this section for the impact tool(s) you described in Section 2 above. The tips in the Extending the Fundamentals section can provide clues. Also See [Worksheet 2](#) if you wish to draft shareable guidelines for your impact program and [Worksheet 3](#) to create assessment criteria for organizations seeking support.

Pipeline Building:

The people who help find ideas or partners that potentially fit our social impact goal:
(e.g., board members, trusted advisors or friends, community advisors, staff)

The methods we'll use to find qualified ideas or applicants:
(e.g., asking other funders for suggestions, open application process, invitation-only process, a blend of methods)

The materials we'll use:
(e.g., no applications, accepting materials sent to other funders, the Charting Impact questions, or a more customized application)

The frequency of accepting and reviewing materials (if any):
(e.g., ongoing, quarterly, annually)

Screening:

The people who will evaluate the ideas or applications for fit with our philanthropic niche and style:
(e.g., board members, trusted advisors or friends, community advisors, staff)

The methods they'll use for evaluation:

(e.g., phone calls or video meetings, in-person visit to a facility or program, scoring checklist based on philanthropic style or application questions, or a financial health analysis)

Decision Making:

The people who will make the final funding decisions:

(e.g., board members, trusted advisors or friends, community advisors, staff)

The criteria they'll use to make the final funding decisions:

Note: if different from the philanthropic style decisions

The decision-making method they'll use:

(e.g. consensus or majority vote; open discussion or numerical scoring)

Implementation:

Who will communicate our decisions and how?

(e.g., phone call or email first, just send a letter with a check; will we communicate why we've declined a request and how)

The monitoring process we'll use:

(e.g. ongoing conversations with the grantee, reading their social media or e-newsletter, being involved personally, asking for a short report)

5. Our Expanded Toolkit

How will we augment our impact tool(s) with influence, leverage, or learning tools? How else can we use our resources to benefit our partners and achieve our vision for success? (Do your best to estimate the uses of your resources and refine the numbers as you learn more.)

Impact Tools:

(e.g. convening, capacity building, strategic communications, and advocacy and public policy)

Vehicle	Tool	Estimate Uses of Treasure	Use Now, Soon, or Later?

Notes on how we'll use our time, talent, ties, and testimony:

Leverage Tools:

(e.g. expanding the base, facilitating collaboration, responsible purchasing, and corporate social responsibility)

Vehicle	Tool	Estimate Uses of Treasure	Use Now, Soon, or Later?

Notes on how we'll use our time, talent, ties, and testimony:

Learning Tools:

(e.g. new research and data, reporting and media coverage, learning networks, and evaluation capacity building)

Vehicle	Tool	Estimate Uses of Treasure	Use Now, Soon, or Later?

Notes on how we'll use our time, talent, ties, and testimony: