“It must be so fun to give money away!” It’s a reaction we’ve all heard when we tell people we are staff members or board members of a grantmaking organization. And yes, it is fun…but it’s also hard work. Good grantmaking – as we know – is about far more than reading piles of proposals or signing big checks; it’s about identifying needs, evaluating potential solutions, and thoughtfully employing dollars to make an impact.

At last year’s Exponent Philanthropy National Conference in Chicago, we presented a session with GrantCraft’s Jen Bokoff about doing just this—identifying priority needs and leveraging points for change, whether in a specific geographic region or around a particular issue area. The room was packed with foundation staff and board members interested in practical tips and tricks for “scanning” the landscape in order to inform good grantmaking.

Missed the session? Here are the top ten ideas we presented to fit a variety of timeframes, budgets, and operating styles.

1) Get your boots muddy

As grantmakers, often our best and greatest insights come when we get away from the comfort of our offices. We need to take time to really listen to and experience
first-hand the work of those we fund. This is Jenna’s “muddy boots” theory. As a program officer, she keeps a pair of boots on hand that she wears to site visits to nature preserves, construction sites, etc. And they are very muddy! The insights that come from being on-the-ground (literally!) are critical for good grantmaking.

2) Listen to the experts...including your grantees

No matter how many years of experience you have as a grantmaker, you are usually one step removed from the programs of the nonprofit organizations you are funding. It's important to view philanthropy as a way to channel resources to these experts doing the work and not as a way for you to set the agenda because of your role as funder. Create opportunities to gain insights from and have meaningful dialogue with your grantees and others working in the field. Carol especially enjoys attending grantee-organized symposia where new research is presented, even if she is the only funder in the room. Not only is the enthusiasm for the work contagious, but she comes back to the office with new funding ideas to explore.

3) Read up

Reading newspapers, blogs, and books is one of the best ways to keep up with trends that can inform your grantmaking. Even blocking out 15 minutes a day to read is a great investment of time--it sparks new ideas, can give you contacts, and helps provide context when you meet with grantees dealing with a specific challenge. Check out Jenna's reading list here.

4) Get the whole picture...not just one piece

When considering a new funding area (or even re-evaluating an existing area), think outside the box. You’d be amazed what you can learn from the bus drivers who navigate neighborhoods every day, the police officers and emergency room doctors who see society from unique angles, and the baristas and bartenders who interact with dozens of community members. Ask for their insights...you might be surprised what you hear! As Ball Brothers Foundation explores ways to improve the quality of life in its hometown, Jenna talks with downtown business owners, neighborhood associations, neighbors, economists, bus drivers, and others. She often asks questions like: “What do you like most about living here?” “How have you seen the city change in the past 5 years?” “What challenges in our city do you feel aren’t being addressed?”

5) Seek out things that make you uncomfortable
When Carol began her work at the Ho/Chiang Foundation, she was new to the world of funding for palliative care programs. No doubt, it’s an issue area that many might find uncomfortable, and Carol had her worries that she might find it so. She acknowledged these realities, adopted a learning mindset, and – employing the techniques we list here – worked hard to get up to speed in the field. Carol quickly discovered that her new program area was exciting from a grantmaker’s perspective as there are many opportunities for private funding to make a meaningful difference in palliative care. She was also personally inspired by the dedication and compassion of the people working in the field. Professional – and personal – growth comes when we expand our comfort zones.

6) **Visualize funding and gaps to highlight opportunity**

By the end of Carol’s first year in her new position, she was able to identify the five highest-priority “needs” in the field of palliative care, along with specific ways that private funding might help address each those needs. She then determined how the Ho/Chiang Foundation’s existing grants fit into this framework. Clearly identifying how much of its grantmaking budget was going towards each priority helped the Foundation decide if it was satisfied with its current grantmaking strategy. Carol created an Excel spreadsheet that visually mapped this information, but a pie chart, graph, or an actual mapping program would also work well, depending on the funding field and the audience you are trying to reach. Visuals can help bring information to life!

7) **Tap into tools**

There’s no need to reinvent the wheel, so tap into resources that already exist to help funders identify gaps and funding opportunities. Interested in a specific issue area? **IssueLab** ([http://www.issuelab.org/](http://www.issuelab.org/)), a free service of Foundation Center, provides a summary of foundation funding and research on 35+ issues ranging from animal welfare to substance abuse. Looking at a specific geographical area? Check out Foundation Center’s **Foundation Maps** ([http://maps.foundationcenter.org/](http://maps.foundationcenter.org/)) for interactive maps showing funding distributions from the neighborhood level to the global level. Want to engage your board or staff members in assessing needs? Check out Monitor Institute’s free **The Strategy Landscape tool** ([http://monitorinstitute.com/?c=strategy-landscape](http://monitorinstitute.com/?c=strategy-landscape)). Or, simply set up a Google Alert to feed new content directly to your inbox about a topic or geographic area.

8) **Know what’s needed, but don’t overdo it**
When you are eager to share your knowledge and ideas, chances are good that you might overwhelm board members or other staff with too much information. We’ve all heard stories about lengthy reports that are filed away without being read or program logic models that are too visually-complicated for anyone to understand. A good “scan” should highlight important ideas, be presented clearly and concisely, and offer opportunity for reaction and action. In the example in #6 above, Carol was sure that a spreadsheet could effectively summarize information for her Foundation’s board.

Know your audience and its preferred learning style.

9) Don’t try to learn on your own

Tap the knowledge and power of other funders! Affinity groups, regional grantmaking associations, and funder collaboratives – both formal and informal – are a great place to build your knowledge and network with other funders. Through local and regional grantmaking groups Jenna has gained new knowledge about a myriad of topics affecting the community including opioid and tobacco use, family economic insecurity, and infant mortality, to name a few—and she’s gained insights into other funders are helping to address these challenges.

10) Remember: scanning is on-going

Build listening and scanning activities into your daily, monthly, and quarterly routines (or however you like to think about or track your time). As a GrantCraft’s Scanning the Landscape 2.0 (http://www.grantcraft.org/guides/scanning-the-landscape-2.0) guide describes, as a funder you “don’t have the luxury of being behind the curve because you’re going to end up making decisions that are irrelevant.” Build time in your schedule every day to read new articles or publications, get out in the field at least twice a month, meet with another funder each quarter, or organize an annual convening of grantees and other experts centered on a specific topic. Also consider any documents you draft in your scanning work, including visuals like maps or graphs, to be “living” documents that are continually updated with new information.

We’d love to hear how your organization uses scanning. Share your own tips in the comment box below!

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