

Leadership Investment Matrix

Consider your community foundation’s potential leadership roles in the context of what you have to invest. The matrix below suggests relative expectations for the staff time, grant dollars and influence needed to assume common leadership roles. Use the last column to assess how well each role fits the culture and circumstances of your community foundation.

- = low
- = medium
- = high

LEADERSHIP ROLES	INVESTMENT EXPECTED			FIT WITH OUR COMMUNITY FOUNDATION
	TIME	GRANT \$\$	INFLUENCE	
Even-Handed Convener: Bringing key groups together to discuss issues, raise awareness or increase efficiency.	○	○	○	
Mobilizer: Building momentum around an issue, seeding connections between keystakeholders and encouraging development of innovative solutions.	○	○	○	
Advocate: Educating and engaging key stakeholders and legislators around critical issues.	○	○	○	
Resource Connector: Forging connections between key organizations that will benefit from the relationship.	○	○	○	
Information Hub: Collecting and disseminating data to fill information gaps around key subjects or issues.	○	○	○	
Fundraiser: Helping generate funding for key causes or organizations.	○	○	○	
Capacity Builder: Aiding nonprofits in increasing their efficiency and effectiveness.	○	○	○	
Philanthropic Advisor: Educating and inspiring donors or potential philanthropists about key issues worthy of investment in the community.	○	○	○	

Leadership Readiness Worksheet

Each organization will begin its community leadership journey from a different place. Whether you have received a request to take on a leadership role, have an opportunity in mind but haven't explored it yet, or are searching for the right place to engage, use this worksheet to begin to assess your level of readiness to act as a community leader. Work with some or all of the six sections in the worksheet below as appropriate for your specific starting point.

ONE Are there any **issue areas** that offer a particularly compelling opportunity for the community foundation to exercise community leadership? If so, list one to three issues below and indicate your level of interest in each. In the space provided, make any comments on why these issues merit investing the foundation's resources or using its influence.

	NO INTEREST					INTEREST									
Issue:	1	2	3	4	5										
Comments:															
Issue:	1	2	3	4	5										
Comments:															
Issue:	1	2	3	4	5										
Comments:															

Leadership Readiness Worksheet *continued...*

TWO. What **resources** in terms of dollars, time or other means does the community foundation have to invest in leadership efforts? List below.

Funds:	<p>Emerging leader tips: Choose a “right-sized” role. While larger foundations may be able to pursue multiple areas of community leadership simultaneously, emerging foundations with fewer resources will need to carefully select the area where they will exercise community leadership.</p> <p>Emphasize quality over quantity. Take on a smaller effort and execute it well, rather than overextending.</p>
Staff time:	
Board time:	
Relationships:	
Space:	
Knowledge or expertise:	
Other:	

THREE. What types of **influence** does the community foundation, including board and staff members, have to offer to the community in its leadership? List below.

Connections:	<p>Also consider: What other commitments does the foundation currently have that could impact your ability to execute on this opportunity?</p> <p>Can you be consistent in your effort?</p>
Skill/capacity building:	
Reputation and credibility:	
Other:	

Leadership Readiness Worksheet *continued...*

FOUR. Are strong potential partners available and interested?			
Partners:	Issue(s) on which to partner:	Partner role/contribution:	Action needed to engage partner:

FIVE. What are the potential **risks** of participation in a community leadership role? How might we mitigate those risks? Describe below.

Strained time and money:

Shift in strategy and/or identity:

Increased scrutiny:

Political controversy:

Donor alienation:

Other:

Leadership Readiness Worksheet *continued...*

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SIX. What are the possible **benefits** of participation in a community leadership role?

Create greater impact:

Increase visibility:

Grow credibility:

Build or share knowledge:

Offer or grow capability:

Make meaningful connections:

Other:

Leadership Strategy Discussion Guide

Use the *Leadership Investment Matrix* and responses to the *Leadership Readiness Worksheet* as reference materials for a productive conversation about potential leadership strategies.

1. On which issue(s) does our community foundation have the potential to create the greatest impact through greater leadership?
2. Which roles could we take on to address the issue(s) identified above? Potential roles could include: <ul style="list-style-type: none"> <input type="radio"/> Even-handed convener <input type="radio"/> Mobilizer <input type="radio"/> Advocate <input type="radio"/> Resource connector <input type="radio"/> Information hub <input type="radio"/> Fundraiser <input type="radio"/> Capacity builder <input type="radio"/> Philanthropic advisor
3. Which issue(s) will require the highest levels of investment ? Consider investments in terms of: <ul style="list-style-type: none"> <input type="radio"/> Time <input type="radio"/> Grant dollars <input type="radio"/> Influence
4. Do we have the capacity to take on these role(s) at the appropriate levels of investment?
5. What are the greatest potential risks , and how can we manage them? Risks may include: <ul style="list-style-type: none"> <input type="radio"/> Strained time and money <input type="radio"/> Shift in strategy and/or identity <input type="radio"/> Increased scrutiny <input type="radio"/> Political controversy <input type="radio"/> Donor alienation
6. Do the potential benefits justify the investments and risks?
7. Who could we partner with and how can we make a unique contribution relative to these organizations or groups?
8. What additional knowledge or data do we need to determine our path forward?