

# Six Questions to Sharpen a Philanthropic Collaborative's Value Proposition: A Toolkit for Leaders and Funders

# Toolkit: Context and instructions

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## Context

In working with dozens of philanthropic collaboratives, The Bridgespan Group has developed a series of iterative questions we believe can help collaborative leaders—along with the donors and partners that support them—sharpen their value propositions and paths to impact. We often walk our clients through these deceptively simple yet profound questions as they navigate choices before formal launch and at critical points in their organizational journeys.

We had the chance to workshop these questions with over 300 collaborative leaders and donors at the [2025 Global Summit of Collaborative Funds](#), co-hosted by the Gates Foundation and Philanthropy Together. We have incorporated this group's input into this revised and expanded toolkit.

This toolkit is designed to support collaborative leaders and funders alike, and while the questions are numbered (given that we believe organizational form typically follows strategic function), it may be helpful to home in on the questions that are harder to answer. You may also need to go back to previous questions as the responses to others become clear. We also acknowledge that the illustrative examples on the following pages don't represent the full set of options available to collaborative leaders and funders. Please use them as starting points for your respective journeys.

## Instructions

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Review the following pages and consider how you might answer the questions for your collaborative or for one that you support. Use the check boxes to select the options with your organization in mind (or create new ones in the spaces provided). Also, for each question, consider whether relevant stakeholders (e.g., leaders and staff of collaboratives, other grantees, and fund leaders) agree with your responses.

After filling out the worksheet, reflect on:

- What questions or additional thoughts did this exercise bring up for you?
- How do these answers fit together? Are there any that, taken as a whole, create strategic or operations tensions or challenges?

# Six questions for collaborative leaders to consider

Often requires an iterative approach

<p><b>1</b> Is there a <b>clear and compelling rationale</b> for launching or maintaining the collaborative?</p>	<p>What social impact does the collaborative seek to have? Is the collaborative bringing in new dollars or aligning existing dollars? What is the specific rationale and value proposition it brings to donors, recipients, and the issue area? Will it bring something new to the field?</p>	<p><b>Investment thesis</b></p>
<p><b>2</b> How does the collaborative <b>work with donors</b>?</p>	<p>How are decisions made, and what decision rights do funders retain regarding strategy and grantmaking? How much are funders expected to contribute? What types of donor networking, education, and engagement does the collaborative offer?</p>	<p><b>Funding structure</b></p>
<p><b>3</b> How will the collaborative <b>deploy financial and nonfinancial resources</b> to achieve its aims?</p>	<p>How will the collaborative source giving opportunities? What criteria and process will be used to decide whether to invest? How will it structure grants? What does the collaborative offer grantees and the field beyond money?</p>	<p><b>Fund distribution strategy</b></p>
<p><b>4</b> How will the collaborative <b>measure, evaluate, and learn (MEL)</b>?</p>	<p>What will the collaborative measure (e.g., grantee portfolio impact, field/movement impact, donor impact)? How does the collaborative report impact to its stakeholders?</p>	<p><b>MEL strategy</b></p>
<p><b>5</b> How will the collaborative <b>operate</b>?</p>	<p>How will the collaborative's operations be funded and what will be the collaborative's budget breakdown? What processes, systems, and staff does the collaborative need to support its strategy?</p>	<p><b>Operating model</b></p>
<p><b>6</b> How will the collaborative <b>evolve over the years, and what might be its end game</b>?</p>	<p>Will this effort be ongoing or a fixed-term initiative, or something else? How will the collaborative know whether/when to sunset?</p>	<p><b>End game</b></p>



<p><b>1c</b></p> <p>Is the collaborative bringing new dollars or aligning existing?</p>				<p>Are the relevant stakeholders aligned?</p> <p>YES</p> <p>MAYBE</p> <p>NO</p>
	<p>Unlocking net new dollars is primary focus</p>	<p>Aligning existing and unlocking net new dollars</p>	<p>Aligning existing dollars</p>	
<p><i>Type additional notes here</i></p>				

<p><b>1d</b></p> <p>What is the collaborative's primary investment thesis?</p>	<p>While you may ascribe to multiple investment theses, we encourage you to select your "primary" here:</p>			<p>Are the relevant stakeholders aligned?</p> <p>YES</p> <p>MAYBE</p> <p>NO</p>
	<p>Supporting individual organizations to advance their missions</p>	<p>Supporting a range of efforts and organizations working on a shared goal (e.g., resourcing community-driven change, cross-sector coalitions, fields, and/or movements)</p>	<p>Supporting place-based change to further progress in a specific geography</p>	
<p>In one sentence, write what you envision the value proposition of the collaborative to be:</p>				

## 2 How does the collaborative **work with donors**?

<p><b>2a</b></p> <p>How would you describe the majority of the collaborative's donor base?</p>	<p>Institutional private philanthropy</p>	<p>Government, bilateral, and/or multilateral funders</p>	<p>Individual donors/funders</p>	<p>Mix of institutional, government/bilateral/multilateral/individual funders</p>	<p>Are the relevant stakeholders aligned?</p> <p>YES</p> <p>MAYBE</p> <p>NO</p>
<p><b>2b</b></p> <p>Is the collaborative exclusive or open to all?</p>	 <p>The fund is exclusive and has significant requirements (often minimum giving commitment) to join</p> <p>The collaborative has a minimum requirement to join; there may be tiers (i.e., differential decision rights or benefits for donors joining at different levels)</p> <p>The fund is open to all and there are no requirements to join</p> <p><i>Type additional notes here</i></p>			<p>Are the relevant stakeholders aligned?</p> <p>YES</p> <p>MAYBE</p> <p>NO</p>	

2c

How much are funders expected to contribute?

How much are funders expected to contribute financially?



Significant lift expected of donors to contribute financially

Minimum giving levels required

No minimum giving levels

*Type additional notes here*

Are the relevant stakeholders aligned?

YES

MAYBE

NO

How much time and additional resources are funders expected to contribute?



Significant lift expected of donors to contribute, with time and/or other resources

There are significant optional enrichment activities

There are optional governance/leadership opportunities or an opportunity to provide only financial support

Limited engagement required ("easy button")

*Type additional notes here*

2d

How will the collaborative make decisions?

1. What is the formal and informal governance of the collaborative (e.g., steering committee, management committee, etc.)?

2. Do donor decision-making rights change based on the amount of funding committed?

3. Are there specific points in time where decision making is reassessed, or is it set once?

2e

What types of donor networking, education, and engagement does the collaborative offer?

2f

What (if any) decision rights do donors retain?

Donors retain control/make independent grant decisions

Mix (some donors align giving, others pool giving; pooled giving generally approved by donor governance)

Pooled funding; donors retain governance over funding allocation

Fully pooled funding; donors give control to fund management

Fully pooled funding; collaborative employs participatory funding and shifts at least some grantmaking control to community members

*Type additional notes here*

Are the relevant stakeholders aligned?

YES

MAYBE

NO



<p><b>3c</b></p> <p><b>Structuring grants:</b> What is the typical grant size?</p>			<p>Are the relevant stakeholders aligned?</p> <p>YES</p> <p>MAYBE</p> <p>NO</p>
	<p>Small (\$K)</p> <p style="text-align: right;">Large (\$10Mn+)</p> <p><i>Type additional notes here</i></p>		

<p><b>3d</b></p> <p><b>Structuring grants:</b> How project-oriented versus general support are the grants offered?</p>					<p>Are the relevant stakeholders aligned?</p> <p>YES</p> <p>MAYBE</p> <p>NO</p>
	<p>Totally unrestricted</p>	<p>Partially restricted/ partially unrestricted</p>	<p>Unrestricted but funding a strategic plan</p>	<p>Project-based</p>	

<p><b>3e</b></p> <p>What does the collaborative offer its grantees beyond money? (may select multiple)</p>	<p>Coaching/ leadership development</p>	<p>Technical assistance</p> <p>Donor introductions</p>	<p>Financial planning</p> <p>Strategic planning</p>	<p>DEI-related support</p> <p>Other</p>	<p>Are the relevant stakeholders aligned?</p> <p>YES</p> <p>MAYBE</p> <p>NO</p>
	<p>Type additional notes here</p>				

<p><b>3f</b></p> <p>What does the collaborative offer the field beyond money? (may select multiple)</p>	<p>Networking/ convening/ relationship building</p>	<p>Research/ publications/ thought leadership</p>	<p>Engaging and building knowledge of donors</p>	<p>Resource mobilization for sector</p>	<p>Other</p>	<p>Are the relevant stakeholders aligned?</p> <p>YES</p> <p>MAYBE</p> <p>NO</p>
	<p>Type additional notes here</p>					

# 4 How will the collaborative **measure, evaluate, and learn?**

4a

What will the collaborative measure and how will it view its impact?

Individual grantee level:

Grantee portfolio level:

Long-term impact, such as on a field, population, or system:

Donor level, including members of your fund/vehicle/platform or the broader philanthropic ecosystem:

For more context on each of these levels see our 2024 article, "[How Philanthropic Collaboratives Measure, Evaluate, and Learn.](#)"

Are the relevant stakeholders aligned?

YES

MAYBE

NO

4b

How does the collaborative report impact to its stakeholders?

We report individually to funders

We have an annual report but provide individual measurement to funders

We only have one annual report all funders receive

Type additional notes here

Are the relevant stakeholders aligned?

YES

MAYBE

NO

## 5 How will the collaborative **operate**?

<p><b>5a</b></p> <p>How will the collaborative's operations be funded? (may select multiple)</p>	<p>How do you cover operating costs?</p>			<p>Are the relevant stakeholders aligned?</p> <p>YES</p> <p>MAYBE</p> <p>NO</p>
	<p>Philanthropy</p> <p>Program services</p>	<p>Board pays</p> <p>Fee/allocation of gift amount</p>	<p>Endowment</p> <p>Other</p>	
	<p>How can this scale over time?</p> <div style="background-color: #e0e0e0; height: 100px;"></div>			

<p><b>5b</b></p> <p>What will be the collaborative's budget breakdown?</p>	<p>What percentage of the total budget...</p>			<p>Are the relevant stakeholders aligned?</p> <p>YES</p> <p>MAYBE</p> <p>NO</p>
	<p>Is directed to external recipients?</p>	<p>Supports other programmatic activities (e.g., convenings, knowledge production, trainings)?</p>	<p>Supports core operations (e.g., finance, administration, HR, executive leadership/management)?</p>	
	<div style="background-color: #e0e0e0; width: 50px; height: 20px; display: flex; align-items: center; justify-content: center;">%</div>	<div style="background-color: #e0e0e0; width: 50px; height: 20px; display: flex; align-items: center; justify-content: center;">%</div>	<div style="background-color: #e0e0e0; width: 50px; height: 20px; display: flex; align-items: center; justify-content: center;">%</div>	

<p><b>5c</b></p> <p>How will the collaborative be structured?</p>	<p><b>Fiscally sponsored</b></p> <p><b>Public charity</b></p>	<p><b>LLC</b></p> <p><b>Private foundation</b></p>	<p><b>Informal organization</b></p> <p><b>Other</b></p>	<p>Are the relevant stakeholders aligned?</p> <p><b>YES</b></p> <p><b>MAYBE</b></p> <p><b>NO</b></p>
	<p><i>Type additional notes here</i></p>			

<p><b>5d</b></p> <p>What are the processes, systems, and staff the collaborative needs to deliver its strategy with excellence?</p>	<p><b>Strategy</b></p> <p><b>Grantee sourcing/diligence support</b></p>	<p><b>Fundraising/donor partnerships</b></p> <p><b>Stakeholder/field engagement</b></p>	<p><b>Other</b></p>	<p>Are the relevant stakeholders aligned?</p> <p><b>YES</b></p> <p><b>MAYBE</b></p> <p><b>NO</b></p>
	<p><i>Type additional notes here</i></p>			

## 6 How will the collaborative **evolve over the years**, and what might be its **end game**?

<p><b>6a</b></p> <p>Has the collaborative discussed its time horizon?</p>	<p>Yes      Somewhat      No</p> <p><i>Type additional notes here</i></p>	<p>Are the relevant stakeholders aligned?</p> <p>YES</p> <p>MAYBE</p> <p>NO</p>
<p><b>6b</b></p> <p>(If answered yes to 6a.) What has the collaborative decided for its time horizon?</p>	<p>←—————→</p> <p>One time initiative (time-limited)      Possibility for multiple time-limited funds      Ongoing</p> <p><i>Type additional notes here</i></p>	<p>Are the relevant stakeholders aligned?</p> <p>YES</p> <p>MAYBE</p> <p>NO</p>
<p><b>6c</b></p> <p>What would make the collaborative rethink this decision?</p>	<p><i>Type additional notes here</i></p>	<p>Are the relevant stakeholders aligned?</p> <p>YES</p> <p>MAYBE</p> <p>NO</p>