The Bridgespan Group

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

Toolkit: Context and instructions

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 <u>2025</u> <u>Global Summit of Collaborative Funds</u>, 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

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.

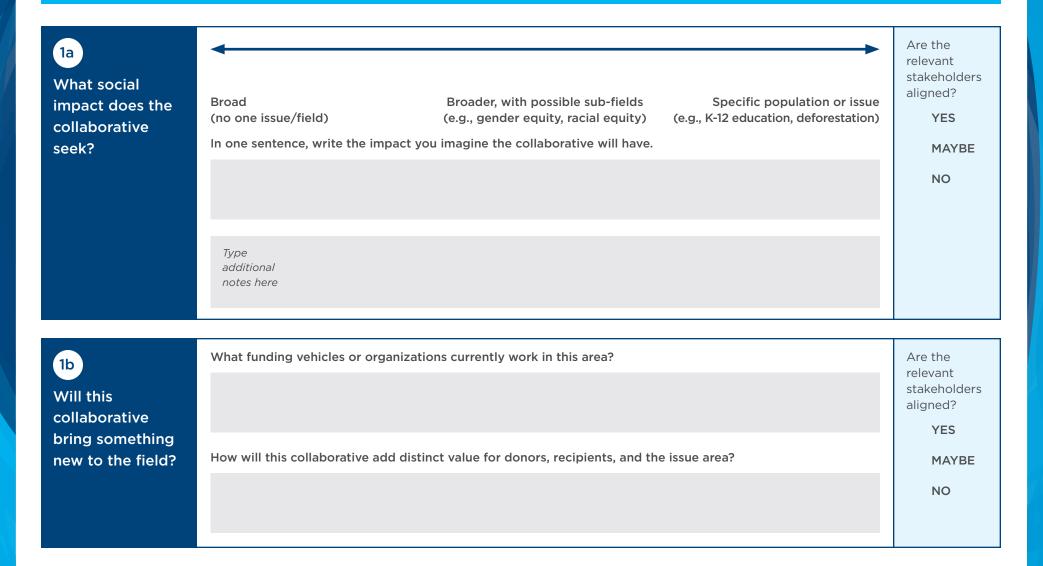
After filling out the worksheet, reflect on:

- 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
Is there a clear and compelling rationale for launching or maintaining the collaborative?	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?	Investment thesis
2 How does the collaborative work with donors?	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?	Funding structure
How will the collaborative deploy financial and nonfinancial resources to achieve its aims?	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?	Fund distribution strategy
How will the collaborative measure, evaluate, and learn (MEL)?	What will the collaborative measure (e.g., grantee portfolio impact, field/movement impact, donor impact)? How does the collaborative report impact to its stakeholders?	MEL strategy
5 How will the collaborative operate ?	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?	Operating model
6 How will the collaborative evolve over the years, and what might be its end game?	Will this effort be ongoing or a fixed-term initiative, or something else? How will the collaborative know whether/when to sunset?	End game

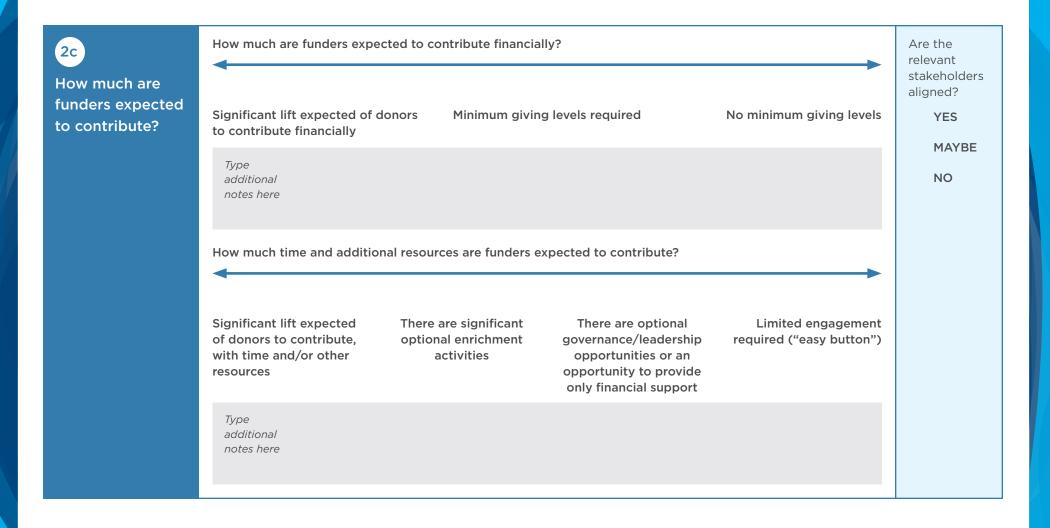
1 Is there a **clear and compelling rationale** for launching or maintaining the collaborative?



1c Is the collaborative bringing new dollars or aligning existing?	Unlocking net new dollars is primary focus	Aligning existing and unlocking net new dollars	Aligning existing dollars	Are the relevant stakeholders aligned? YES MAYBE NO	
1d What is the collaborative's primary investment thesis?	notes here While you may ascribe to multiple investment theses, we encourage you to select your "primary" here: Supporting individual organizations to advance their missions 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) Supporting individual and/or movements) In one sentence, write what you envision the value proposition of the collaborative to be: In one sentence, write what you envision the value proposition of the collaborative to be:				

2 How does the collaborative work with donors?

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

1	
7	25
	21

What (if any)
decision rights
do donors retain?

control/make independent grant decisions

> Type additional notes here

Donors retain

Mix (some donors align giving, others pool giving; pooled giving generally approved by donor governance) Pooled funding; donors retain governance over funding allocation

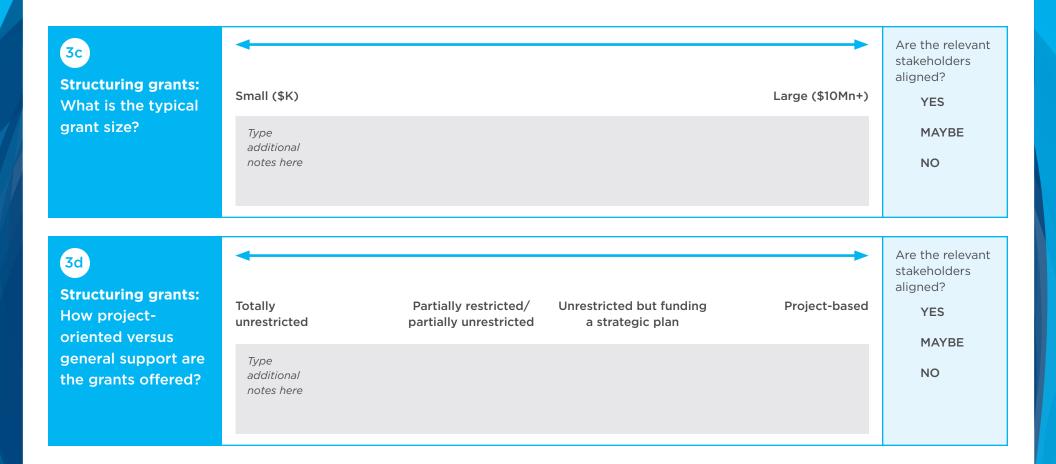
Fully pooled funding; donors give control to fund management Fully pooled funding; collaborative employs participatory funding and shifts at least some grantmaking control to community members Are the relevant stakeholders aligned? YES MAYBE NO

8

3 How will the collaborative **deploy financial and nonfinancial resources** to achieve its aims?

3a Sourcing grantees: Is this collaborative open to applications from all or is the process closed?	Open source Type additional notes here	Mix of closed and proa	ctive outreach	Proactive outreach	Are the relevant stakeholders aligned? YES MAYBE NO
3b Selecting grantees: How does the collaborative decide on grantees (may select multiple)?	Donors select Donors advise on portfolio leaders propose potential of Internal management comm Participatory mechanisms of with proximate experience) Type additional notes here	grantees) nittee (including those	Panel of external experts/ Other (please explain)	advisors	Are the relevant stakeholders aligned? YES MAYBE NO

9



3e What does the collaborative offer its grantees beyond money? (may select multiple)	Coaching/ leadership development	Technical assista Donor introduct		planning planning	DEI-related support Other	Are the relevant stakeholders aligned? YES MAYBE NO
3f What does the collaborative offer the field beyond money? (may select multiple)	Networking/ convening/ relationship building Type additional notes here	Research/ publications/ thought leadership	Engaging and building knowledge of donors	Resource mobilizati for sector		Are the relevant stakeholders aligned? YES MAYBE NO

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:	Are the relevant stakeholders aligned? YES
Grantee portfolio level:	MAYBE
	NO
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, " <u>How Philanthropic Collaboratives Measure,</u> <u>Evaluate, and Learn</u> ."	

Are the

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	relevant stakeholders aligned? YES
Type additional notes here			MAYBE NO

NO

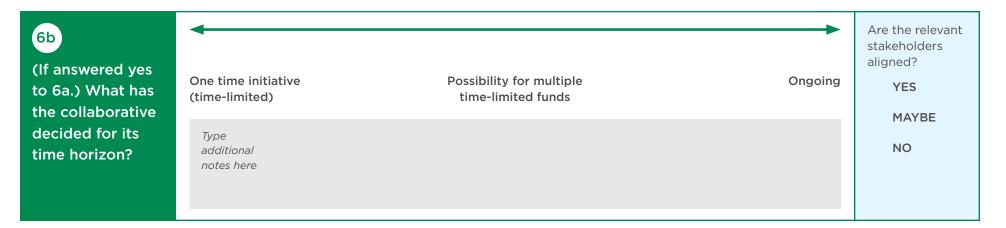
5 How will the collaborative **operate**?

5a How will the collaborative's operations be funded? (may select multiple)	How do you cover o Philanthropy Program service How can this scale o	es	Board pays Fee/allocation of gift ar	indowment Other	Are the relevant stakeholders aligned? YES MAYBE NO
5b What will be the collaborative's budget breakdown?	What percentage of Is directed to external recipients?	Supports other p	programmatic activities s, knowledge production,		Are the relevant stakeholders aligned? YES MAYBE

5c How will the	Fiscally sponsored Public charity	LLC Private foundation	Informal organization Other	Are the relevant stakeholders aligned?	
collaborative be structured?	Type additional notes here			YES MAYBE NO	
5d What are	Strategy Grantee sourcing/diligence support	Fundraising/donor partnershi Stakeholder/field engagemen		Are the relevant stakeholders aligned?	
the processes, systems, and staff the collaborative needs to deliver its strategy with excellence?	Type additional notes here			YES MAYBE NO	

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

6a	Yes	Somewhat	No	Are the relevant stakeholders
Has the collaborative discussed its time horizon?	Type additional notes here			aligned? YES MAYBE NO



6c What would	Are the relevant stakeholders aligned?
make the	YES
collaborative	MAYBE
rethink this decision?	NO