



**Lessons Learned
from Strategy
Landscape Tool**

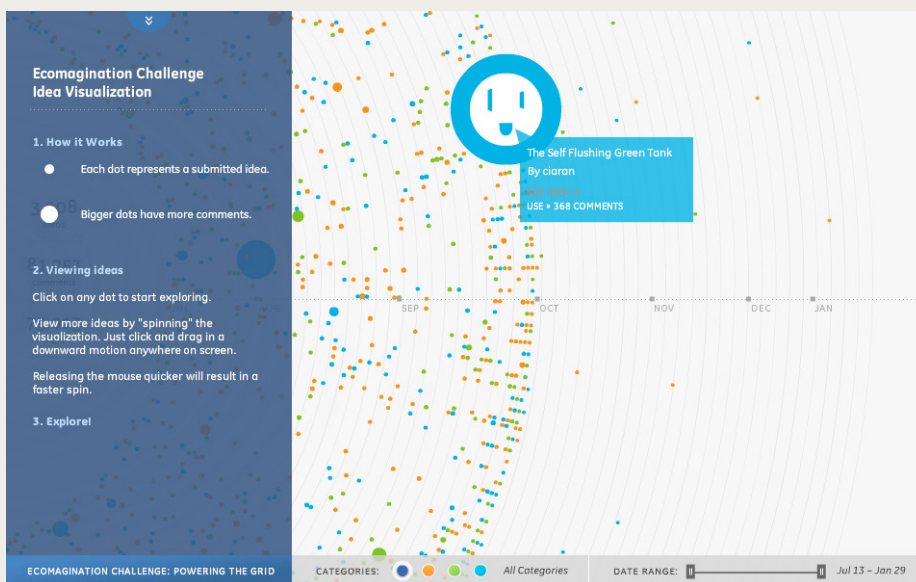
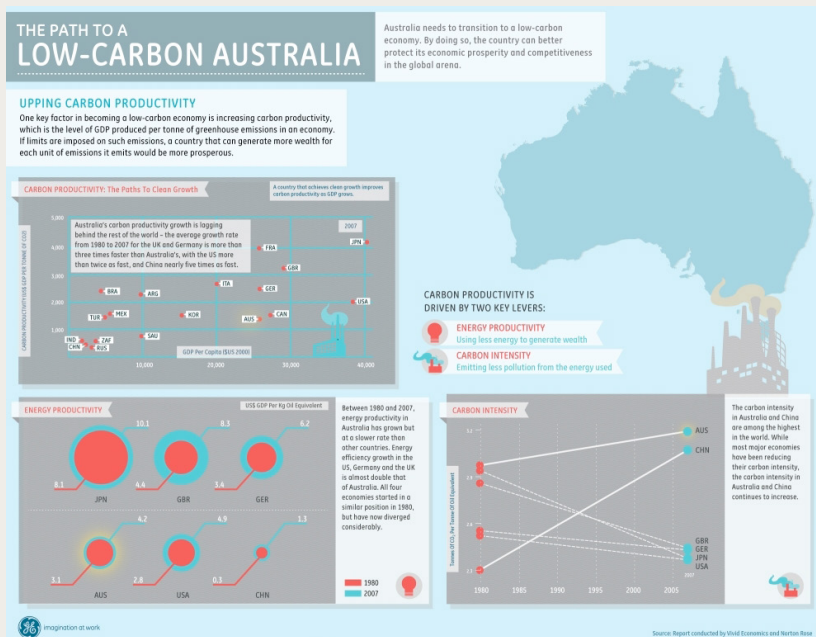
Background

In 2011 Grantmakers for Education (GFE) partnered with the Monitor Institute to develop the K-12 Education Strategy Landscape Tool—an asset mapping tool that used interactive data visualization to provide a clear picture of the who, what, where, and when of education grantmaking. The prototype launched in January of 2012 with initial support from the Rockefeller Foundation, the William and Flora Hewlett Foundation, the Carnegie Corporation of New York, and the Nellie Mae Education Foundation. Over a dozen funders participated in the launch by sharing their grantmaking data.

Unfortunately, this specific venture and approach proved unsustainable in the long run due to reasons outlined below and in the Center for Effective Philanthropy’s article, [“Lessons from a Risk Taken,”](#) which highlights fundamental difficulties in communicating strategies and coordinating grantmaking. The need for such a tool, however, hasn’t changed. There is still a desire in the field for a clearer picture of investments in education grantmaking. A tool that provides this effectively could be of tremendous value for GFE members and the field. To understand how one might better approach a tool like this in the future, GFE and its funding partners saw value in an analysis of the initial project, the learnings of which could be applied to future initiatives. With the support of the William and Flora Hewlett Foundation, GFE brought in Wolff Olins, a consulting firm, to conduct this reflection and produce a report on the findings. Wolff Olins has gained a broad understanding of GFE and the needs of its members through work on its Strategic Planning process in 2014 and has deep external expertise in design and data visualization. A third party perspective is crucial for an objective analysis of the successes and failures of the project.

The Value of Asset Mapping in Education Philanthropy

Asset mapping has clear value in its potential in reducing duplicative efforts, increasing efficiency, and aiding collaboration. When it is presented through data visualization, asset mapping becomes even more effective. In our experience, data is almost always more accessible when visualized. GE and IBM have been hugely successful in unlocking the potential of their data through visualization, and have engaged a wider audience set as a result.



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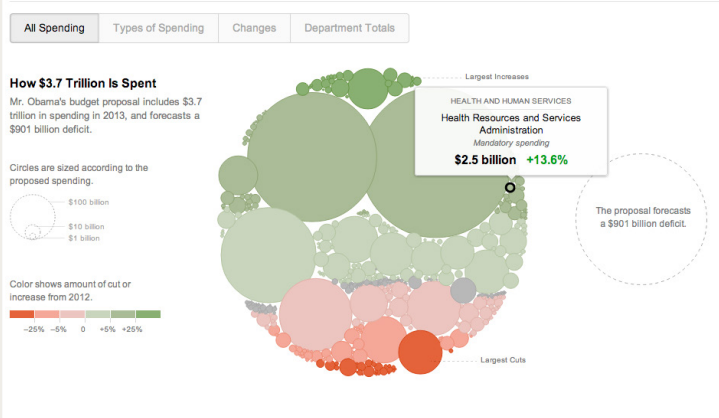
Browse also [IBM Many Eyes Alphaworks project](#)

The Value of Asset Mapping in Education Philanthropy

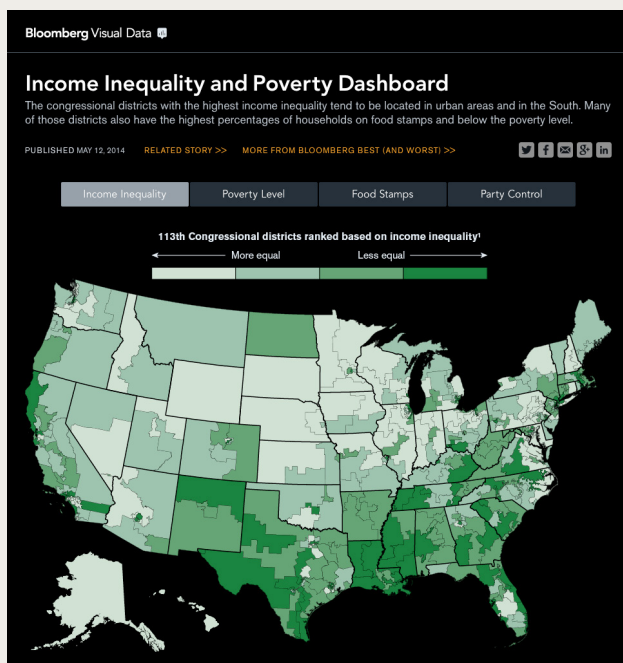
Newspapers such as the *New York Times* are also increasingly utilizing data visualization techniques to convey quantitative relationships in a way that the public can easily digest. Even for mathematic minds, it's easier to process visual cues, such as size, than it is to understand the relative value of numbers. These tools are the most valuable for large, complex data sets that have multiple variables.

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Lessons Learned

We believe that education philanthropy could still benefit from an asset mapping tool due to the complex nature of national grant distribution. A tool of this kind would make it faster and easier for funders to learn about one another, highlight the continuities between different funders, geographies, and strategies, and promote understanding of the larger ecosystem in which education grantmaking is situated. To help ensure that future initiatives of this type yield sustainable results, we conducted follow-up interviews with several representatives of foundations that participated in the development and launch of the Strategy Landscape Tool to shed light on the obstacles they faced, and to offer insight for others going forward.

- 1) The venture put resource pressure on all the organizations involved. Due to the dynamic and complex nature of the data—collection, input, and sorting proved more labor-intensive than expected. The tool's developers also had difficulty tracking down program officers to confirm that their data was accurate and up-to-date. Already resource-sensitive organizations did not see the incentive in doing additional reporting. As a result, moderators had to bear the responsibility of manually gathering each data set. The tool also had high fixed costs because it was highly customizable for each participant.
- 2) While GFE's deep understanding of the field was crucial to create categories distinct from one another, such as “tactical approach” and “grantmaking strategy,” the tool's developers quickly realized that each organization had its own taxonomy to refer to the work that they were doing. This made data coding difficult as the tool required that similar strategies, subject areas, and approaches be grouped together in order to highlight trends. Some organizations didn't categorize their grants at all, putting the responsibility on the tool's developers to understand and categorize each grant.
- 3) Grantmakers were concerned about how their data was represented. Some considered their grantmaking strategies to be intellectual property and there was debate about whether the platform should be open to the public or a GFE-exclusive tool. Many agreed that the tool could be a valuable public resource but that certain elements, such as program officer contact information, would need to only be available to GFE members.
- 4) Funders didn't have a strong reason to use the tool consistently. The insight into the landscape of the field and potential for collaboration between grantmakers had obvious value during peak planning months, but the level of effort and resources required meant the tool would only be sustainable if funders used it on a daily or weekly basis to learn about other grantmakers and their strategies.

Lessons Learned

- 5) Some funders felt the tool actually made the process of figuring out other funders' strategies less social. Instead of making personal contact with their colleagues at organizations across the country, they would simply access the resources online. Future initiatives should aid relationship-building and avoid a wholesale transition to digital.
- 6) The value of the tool was more at a broad, generalized level. Funders would be satisfied with simple answers to the question, "Who else is doing this type of work?" Unnecessary attention to quantitative detail actually made the tool less accurate due to funders' concerns about data privacy and disparate ways of categorizing grants. For example, some funders did not want others to know that they spend a specific amount of money on a certain project.

Conclusions

Overall our analysis suggests the tool was overly ambitious in its level of specificity and therefore too resource-reliant for the value it provided. It relied heavily on quantitative metrics, but a less precise tool that showed what grantmakers generally fund and where would satisfy funders' needs just the same. The addition of qualitative data could add value to users that want a softer and more general impression of the landscape. It would still be crucial to show geographic regions where grants are being made, for instance, but less focus on specific quantitative data would make information easier to collect. It would also lower overhead and maintenance costs, making the tool more affordable.

Another potential approach, should a new tool be considered, would be to make the information open source and crowdsourced, whereby members are encouraged to upload their own organization and grant profiles. This would reduce the amount of centralized resources required and help balance effort with outcome, although it would also rely on a commitment from the community to provide the information. The value of inputting existing information in databases and member surveys into a future tool should not be overlooked, and neither should potential partnerships be dismissed in favor of building a new tool from scratch.

To conclude, we believe there is evidence that the desire exists for an asset mapping tool that uses data visualization to provide a clear picture of the who, what, where, and when of education grantmaking, and its potential in reducing duplicative efforts, increasing efficiency, and aiding collaboration. We recommend that a future tool avoid trying to drastically alter the way grantmakers currently gather information about the landscape and connect with one another. Instead, it should compliment these processes by providing a more qualitative and generalized view of the field, allowing funders to continue relationship-building through personal connections. The world is becoming increasingly digital. In order to make informed decisions funders not only need accurate data from their grantees, but also a clear understanding of what their peers are funding. An effective data visualization tool is no longer just a "nice to have"; there is a growing expectation that 1) the data exists and 2) is accessible. A data visualization tool depicting education philanthropy is sure to be an indispensable asset to grantmakers in the not-so-distant future.

Acknowledgements

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