



## Helping Philanthropies Evaluate, Learn, and Set Strategic Direction

### Our Approach to Foundation Services

Philanthropy is one of the great engines of social change in the United States and increasingly around the world. It is a blessing and a responsibility—challenging leadership, programs, and grantees to be wise and strategic stewards of this unique resource.

Ross Strategic helps philanthropies meet this challenge. We help foundations chart strategic direction and learn from experience. We work with foundations and their grantees to get the most out of innovative programs and become more efficient, responsive and results-oriented. We help the philanthropic community align their efforts and harness multi-stakeholder and community-based decision-making.

Our content expertise—spanning environment, energy, climate change, natural resource management,

public health, equity and economic development—allows us to provide strategic insights and facilitate content-rich collaborations. We understand the context in which philanthropies work because we also work extensively with government at all levels and with civil society organizations. We understand what makes grantees function well because we work with many of them to develop strategy, increase organizational health, and enhance effective leadership.

Our full-suite of services provide foundations with an integrated approach to strategy, evaluation and learning, collaborative processes, portfolio analysis, and organizational health. We draw on many highly collaborative, interactive, and creative methods to tailor our work to be most useful to every client.



Our staff bring together broad public policy expertise and experience helping public and private organizations innovate and implement change.

#### SERVICES

Strategy

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Research and Analysis

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Design and Implementation

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Evaluation and Learning

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Collaborative Processes

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Information Management

# Foundation Services

**Strategy:** From a program refresh to a strategic overhaul, we excel at helping organizations chart their strategic direction. We tailor strategy development to client's needs using creative techniques to define theories of change, craft logic models, and create strategic narratives that bring program strategies and goals to life. We believe that strategy development is a process not just a product—it requires commitment, internal process alignment, and the right organizational structure to achieve desired results.



**Evaluation and Learning:** Whether assessing and refining internal operations or large-scale philanthropic initiatives, our integrated approach to evaluation and learning generates strategic insights that are immediately relevant. We employ participatory methods to engage a diverse set of stakeholders, building trust and drawing out candid feedback. We create a constructive space for reflection and insight, building on “What?” to answer “So what?” and “Now what?”



**Collaborative Processes:** Whether through funder collaboratives, NGO coalitions, or meetings with grantees and experts, we bring the right people together in the right process. Our deep expertise in collaborative process design and effective facilitation maximizes the contribution of participants and leads to clear direction and durable decisions—while creating a fun and welcoming atmosphere.



**Portfolio Analysis and Visualization:** Grant portfolios and non-grant activities turn strategy into action and experience into insight. Our visualization techniques and collaborative exercises help program teams understand the portfolio they have and guide it to where they want to go.



**Organizational Health and Leadership:** Healthy organizations do good work. We help foundation leaders, program teams, and grantees increase their organizational health through management coaching, creating strong teams, and turning feedback from partners and stakeholders into action.



## SELECT CLIENTS

Children's Investment Fund Foundation

ClimateWorks Foundation

Energy Foundation

Heising-Simons Foundation

Ikea Foundation

McKnight Foundation

The Colorado Health Foundation

The Cynthia and George Mitchell Foundation

The Kresge Foundation

William and Flora Hewlett Foundation

**ROSS**  
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### FOR MORE INFORMATION

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