

A Role Taxonomy to Clarify What Foundations Are Trying to Accomplish

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While some foundations seek to bring about change directly through their own actions (e.g., by developing and implementing their own programs), most foundations achieve their outcomes by supporting other organizations that have influence over the conditions they want to change. The Role Taxonomy is intended to help foundations think through how they can best add value to their partners. It offers a menu of 11 different approaches that a foundation can take. It also describes why and when a foundation might want to use each approach.

The Role Taxonomy was initially developed in 2018 as a tool for evaluating the Clinton Foundation's Community Health Matters Initiative, and more specifically for distinguishing between the different ways in which the foundation's regional directors were supporting community-based projects. The [originally published version](#) of the taxonomy included 6 roles. It has been expanded and revised over the past decade as I have consulted with program staff and leaders at Kate B. Reynolds Charitable Trust, the Colorado Health Foundation, and the Anchorum Health Foundation. Staff members at those foundations have contributed significantly to the version that appears below.

Role	What the Foundation Does	Premise
Financer	Provides funding that allows local organizations to implement their projects	Nonprofit organizations are in the best position to know what needs to be done with regard to the issues they address. Foundations should respect that expertise and direct their resources toward the projects that they regard as most important.
Capacity Builder	- Provides or sponsors training programs focused on issues related organizational capacity, leadership and personal development. - Provides funding for consultation and coaching tailored to the organization. - Connects actors to appropriate consultants.	Promising ideas don't reach their potential because people and organizations don't have all the skills and expertise they need to develop, implement, and scale effective work. Foundations can use their dollars and connections to bring the right TA to the community.
Advisor	- Advises local actors on promising and effective approaches to explore - Advises grantees and applicants on options, programs and available resources	Foundation staff have knowledge about issues, programs and resources that can be valuable to individuals and organizations interested in innovating and creating impact.
Coach	- Help local actors clarify intent, set goals, design and implement strategy, solve problems, etc. - Motivate and guide actors to continue moving forward in the face of challenges.	Many promising ideas are abandoned before they have a chance to take shape and succeed. Some foundation staff have the skills to coach. Applicants and grantees will be motivated to be coached.
Enhancer	Brings resources and brokers partnerships that increase the effectiveness and/or reach of projects designed by local actors	Foundations have connections to a variety of philanthropic, governmental, nonprofit and corporate firms that can add value to nonprofits.
Connector	Links organizations that have shared interests and complementary influence	More comprehensive strategies can be created if groups operating on the same issues coordinate their actions.
Convener/ Facilitator	- Creates the conditions to allow local actors to plan, develop, and implement projects in line with their interests - Offers effective processes for collaborative problem-solving - Provides facilitation, data, analysis, etc.	The most powerful solutions emerge when local stakeholders engage in well-facilitated, collective problem-solving. Foundations are in a position to convene and to design such a process.
Listener / Learner	Reaches out to a broad range of local actors to hear stories about the community, to find change agents, and to learn what they are doing and want to do	This stage of engagement brings crucial insights to the surface and begins to build relationships that become the basis for all future engagement
Activator	Sparks action that moves forward a new or dormant line of work	Promising ideas exist throughout a community, but many are not developed and acted upon. Foundations have a unique ability to stimulate forward movement.
Driver	- Takes the lead in choosing and designing projects implemented by local actors - Provides resources that are essential to implement the project	The foundation has the expertise and perspective to know what approaches will be most effective in allowing a community to achieve its goals.
Co-Strategizer	Partners with other organizations in a give-and-take manner to design and implement a strategy that addresses an issue of shared concern	The most effective solution is not yet clear and will only emerge when the foundation and partners pool their ideas, expertise and resources

How and When Each Role is Deployed

The first role listed in the taxonomy (**Financer**) corresponds with the most basic function that foundations serve – providing dollars to support a nonprofit, either to implement one of its programs or as general operating support. This role corresponds to a transactional mode of operating, where the foundation requests proposals, selects the ones that appear to be best aligned with the foundation's interests, and awards funding to successful applicants to carry out their proposed work.

Moving down the grid, the next four roles reflect supplemental ways that a foundation can add value to an organization – beyond providing dollars.

- **Capacity-BUILDER** involves training, consulting or technical assistance (or group-oriented or individualized) focused on issues that are key to an organization's effectiveness. This assistance is generally provided by a third party, with the foundation funding the work and connecting the nonprofit to the provider.
- This contrasts with the **Advisor** role where foundation staff directly offer advice and recommendations to nonprofits on program strategy or organizational development.
- The **Coach** role also involves personalized interaction between foundation staff and nonprofits, but in a much more in-depth fashion than occurs with the Advisor role.
- The **Enhancer** role takes advantage of the full range of the foundation's assets, including its credibility, its ability to shine a light on issues and solutions, and its connections with public institutions, community leaders, other funders, etc. Applying the foundation's visibility, influence and social capital often yields longer-term value to a nonprofit's programming than does a grant award.

The sixth and seventh roles in the Grid, **Connector** and **Convener/Facilitator**, point to ways in which foundations can move beyond supporting individual nonprofits to stimulate new and more effective work throughout a community or sector.

- Foundation staff play a **Connector** role by taking advantage of their balcony-level knowledge of the various organizations and actors operating in a particular setting. By making contextually informed introductions, program officers and directors can link previously disconnected groups that can benefit from knowing one another and potentially working together. The Mary Reynolds Babcock Foundation pioneered the "[network officer](#)" position as a means of joining together social-change organizations throughout the Southeastern U.S. The foundation learned how important it was for foundations to maintain equanimity when introducing groups to one another, as some connections don't actually pay off.
- The **Convener/Facilitator** role extends beyond brokering connections or developing a network. The point here is to play a useful role in bringing different organizations and individuals together to do collective problem-solving and strategizing around issues of shared concern. Many foundations play this role, although they do so in a variety of ways. Some foundations simply convene the group and provide funding for a facilitator and/or backbone organization. Other foundations actively participate as members of the collaborative or assume the role of the backbone organization. There is also variation on whether the foundation versus the participating groups define what issue they want to address. My own [experience](#) suggests that collaborative efforts are much more likely to

succeed in producing and implementing a viable strategy if the group's agenda emerges naturally from member's own interests rather than being imposed by the funder.

The next two roles (**Listener/Learning** and **Activator**) were identified in conversations with staff at Kate B. Reynolds Charitable Trust and the Colorado Health Foundation who practice the [Cultivation](#) model of place-based philanthropy. Rather than convening a representative group to develop a comprehensive strategy for community-level change, the [Cultivation model begins](#) with foundation staff spending considerable time on the ground exploring the community, meeting with a wide range of residents, and identifying issues and opportunities. Relationships deepen over time and the foundation invests dollars and other resources in local actors who are poised to initiate and implement work that can improve community conditions.

- Foundation staff play a **Listener/Learning** role at the outset as they build their understanding of the community and begin building relationships. The role is called out separately to emphasize the importance of listening and learning before making any choices about the organizations and projects to support.
- As part of this exploratory process, program officers might also **activate** some of the people they engage – defined as encouraging the individual to more actively pursue their ideas for making a difference. The activator role may overlap with advising, coaching and connecting, but is distinct in that occurs at an early stage as a project is beginning to take shape.

The final two roles in the taxonomy involve foundation staff engaging with partners in ways that directly advance the foundation's own strategic interests.

- In the **Driver** role, the foundation is clear on the outcomes it wants to achieve and what it will take for those outcomes to occur – including what work will be carried out by nonprofits with the foundation's funding. As a result, the foundation "drives" the design and implementation the project.
- **Co-Strategizer** is a less directive approach. Here the foundation has strategic interests but doesn't enter the partnership with a preset notion of what the eventual strategy will look like. Instead, the foundation and its partner(s) co-develop a strategy that meets everyone's interests. Co-strategizing can be done either with other foundations (i.e., a [collaborative funding model](#)) or with a nonprofit that the foundation expects to fund.

Using the Taxonomy

The Role Taxonomy articulates the different pathways through which a foundation can achieve its strategic interests and the different ways that a foundation can add value to its partners. This can assist foundations in multiple ways:

- **Developing the foundation's "[theory of philanthropy](#)":** A theory of philanthropy is a description crafted by a foundation that lays out an enduring vision of what the foundation intends to accomplish, the approaches it will take to achieve those outcomes, and how the foundation is organized and staffed in order to carry out those approaches. The eleven roles in the taxonomy offer a wide range of alternative approaches for the foundation's leaders and board to consider when creating their theory of philanthropy. Each role has implicit assumptions as to how the foundation will add value, while also reflecting a particular perspective as to how much or little the foundation should "lean in" with its own agenda or interests. More than one role can be included in a theory of philanthropy, but foundations should resist adopting too many roles and should especially avoid adopting roles that are philosophically inconsistent with one another.

- **Designing strategies or initiatives:** A coherent strategy or initiative will specify the outcomes or objectives that the foundation is intending to accomplish, along with the what the foundation is contributing and how it expects its partners to respond. The Role Taxonomy offers a menu of possible things that a foundation might potentially do within a strategy or initiative. Some initiatives will place the foundation in a Driver role, while others emphasize the foundation's ability to Activate, Enhance, Build Capacity or Connect. Too often, foundations have only implicit expectations for the role(s) that staff will play. By deliberately choosing a limited set of roles, the strategy becomes clear in both design and practice. Roles should be included only if they are consistent with the foundation's theory of philanthropy and are within the realm of feasibility for foundation staff.
- **Aligning expectations among foundation staff:** Naming the roles that a foundation will play provides concrete direction to the staff who are expected to implement its strategies. Many foundation strategies fail to be fully implemented as intended because staff aren't clear on what is expected among them. Even worse, the various staff members within a foundation might have different expectations as to how they should be acting or what they should be trying to make happen. Naming the relevant roles increases understanding and alignment among staff.
- **Communicating intent:** Foundation strategies also fall short when partners are unclear about the foundation's intent. For example, a foundation might have a strategy centered on stimulating local actors to develop and pursue their ideas for improving health, but those local actors may believe that the foundation has its own agenda or preferences for funding. In other words, the foundation may be trying to operate as an activator, coach, enhancer, etc., while the people interacting with the foundation may believe that the foundation is acting as a driver. By spelling out the role(s) that the foundation is playing in the initiative, partners can respond in kind.
- **Evaluating strategies and initiatives:** In selecting which roles are relevant to a strategy or initiative, a foundation will be describing what staff members are expected to do and how partners will benefit from the foundation's contributions. Those expectations are much different for Activator role than for the Driver role or the Financer role. By explicitly naming the roles that the foundation is attempting to play, the evaluator will be able to focus the assessment on the right expectations and hypotheses.
- **Selecting, training and coaching of foundation staff:** Once a foundation has named a limited number of roles that are relevant to its theory of philanthropy, leaders will have clearer expectations for how foundation staff should be operating. As a result, they will be in a better position to select individuals who have the right skill set and orientation. In addition, training, supervision and coaching can all be focused more strategically on helping staff do what the foundation expects. It should be noted, however, that some roles in the taxonomy (e.g., Activating, Coaching) require skills that might be beyond what the foundation has traditionally expected when hiring program officers. Foundation leaders should be sensitive to any disconnects along these lines and provide opportunities for remedial skill building. At the same time, it is important to determine whether there are staff members who do not have the capacity and/or inclination to operate in alignment with roles that the foundation has prioritized. Failing to live up to the expectations associated with a critical role can cause confusion and challenges that ripple throughout the foundation and partner organizations.