Community Impact Agenda Setting
Class 1 - Community Needs

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Estimated time to complete: 1.5 hours

Class Objectives

- Understand how to align the community foundation's purpose with issues and needs in the community.
- Learn to be proactive and reactive - the dynamics of community-centric grantmaking.
- Explore the components of participatory grantmaking and how to incorporate these into your community foundation's grantmaking processes.
- Uncover differing perspectives across communities.

Developing a strong community impact agenda is not just about identifying priorities — it's about creating the conditions for real progress. This process often includes building trust, encouraging collaboration, holding honest conversations, testing ideas, learning from mistakes, and sharing what works.

Module 1: Setting the Scene

Imagine you are a playwright. Before the first word of dialogue is spoken, the scene is set. You consider:

- What does the space look like?
- How does it feel?
- What does it invite people to do?
- How can it support the story you're trying to tell?

As a community foundation leader, you play a similar role. Your first responsibility in setting a community impact agenda is to "set the table" — to create a space where meaningful work can take place.

Ask yourself:

- What environment do I need to create to encourage open ideas and practical solutions?
- What may get in the way of productive conversations?
- What are the clear goals or outcomes we hope to achieve by bringing people together?

This initial step is crucial. The space you create, whether it's a literal room, a process, or a tone, will shape everything that comes next.

Self-Reflection:

- What does "setting the table" look like in my context?
- Have I ever seen a conversation go wrong because the space or tone wasn't thoughtfully set?
- What values or ground rules would help others feel comfortable contributing ideas?
- What am I doing (or not doing) that might unintentionally hinder collaboration?

What's Next

Once the scene is set, the next step is identifying the key people who need to be at the table — those with knowledge, experience, influence, and perspective. These are your "characters" — leaders, residents, donors, partners — who will help move the agenda forward.

From there, the work becomes more experimental: brainstorming, building, refining, failing, learning, and adjusting. And finally, as the process unfolds, you'll begin shaping a story — one you can share to inspire others and guide sustainable action in your community.

Grounding Your Work in Community Needs

The first step in creating an effective space for collaboration is ensuring that its purpose is clearly tied to what your community needs — not just what your organization wants to accomplish.

There's a unique relationship between a community foundation's core activities — fundraising, grantmaking, and convening — and the community it serves. When these efforts are grounded in the realities and priorities of local residents, they are more likely to build trust, attract the right partners, and lead to lasting impact.

This kind of alignment doesn't happen automatically. It requires ongoing attention and intention from staff, board members, and leadership.

Self-Reflection:

- What does it mean for our foundation to be in service to the community?
- In what ways do we gather input or feedback before launching new efforts?
- Are our fundraising and grantmaking priorities aligned with the concerns we hear most often from local partners and residents?
- How do we encourage our staff and board to stay connected to what's happening on the ground?
- When was the last time we changed course based on what we learned from the community?

The more clearly you understand the needs and goals of the people you serve, the more likely you are to build the right kind of space—one that invites collaboration, new ideas, and shared progress.

Module 2: Landscape Scans

Landscape scans are tools funders use to look at a given field or issue area to identify the needs, opportunities, and gaps in funding. They then use this information to guide their giving and strategy decisions and understanding how to be most effective in their philanthropy.

Using Landscape Scans to Guide Your Work

One of the most useful tools for understanding your community's needs is a landscape scan.

A landscape scan is a structured way to assess what's happening in a specific issue area or geographic region. Funders use these scans to identify:

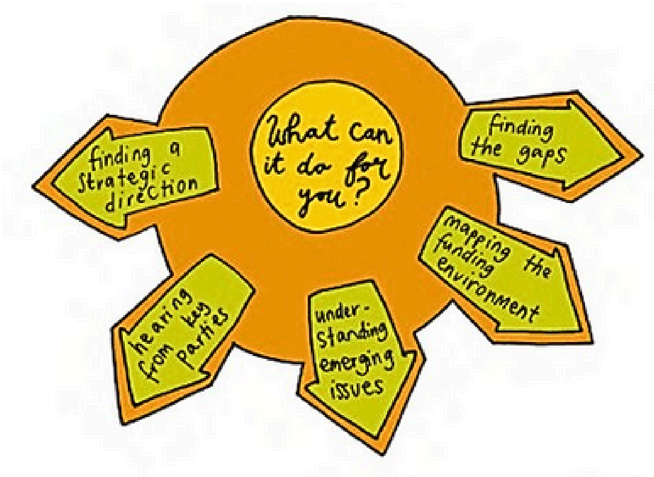
- Needs in the community
- Opportunities for collaboration or innovation
- Gaps in services, resources, or funding

The information gathered can then inform your foundation's grantmaking, convening, and fundraising strategies, ensuring that your work is targeted, relevant, and effective.

Landscape Scan

Be clear with your board, staff, and stakeholders with what you are trying to learn in the scan. Be realistic and manage expectations.

One of the greatest outcomes of landscape scans is building trust in your community.



How to Focus a Landscape Scan

Landscape scans can be broad or targeted, depending on what you want to learn. Some scans are used to gather general insight about community trends, while others are focused on specific questions — like identifying opportunities for investment or uncovering successful programs already making a difference.

No matter how broad or narrow your scan, it's important to begin with a clear goal. What are you trying to learn? What decisions will this information inform? Once you've set some parameters, communicate those goals and expectations clearly with your board and other stakeholders. This helps keep your process focused and builds trust as your findings emerge — whether the results are expected or not.

Real-Life Example
The executive director of a family foundation launched a landscape scan to learn what types of community assets residents wanted most — things like parks, amphitheaters, and recreation centers.

The results? The top request was a grocery store — not the answer the foundation expected.

While they may not be in a position to bring a grocery store to town, the scan itself provided something just as valuable: it engaged residents in the process, showed that the foundation was listening, and started a deeper conversation about the community's priorities. This kind of trust-building can be one of the most important long-term outcomes of doing a scan.

Landscape Scans

How to do a Landscape Scan?
Treat your stakeholders and constituents as the experts and invite them to play a role at your community foundation. Ask questions that encourage big thinking as well as uplift pain points. Gather data through a variety of collection methods, including:
- Surveys
- Interviews (phone or in person)
- Focus groups or small group convenings
- Social media
- Consultants, if needed

What to ask?
- Questions that build trust between the community foundation as a grantor and the nonprofits as grantees
- Questions that allow important issues to surface
- Questions that help sift through the good solutions to find the best one

Getting Started with a Landscape Scan
If you haven't conducted a landscape scan before, don't worry — it doesn't have to be complicated. At its core, a landscape scan is about listening.

You're inviting your stakeholders — nonprofit partners, donors, residents, business leaders, and others — to share their experiences and ideas. The goal is to better understand what's working, what's not, and what opportunities might exist in your community.

A good scan asks open-ended questions that invite big thinking, honest reflection, and practical feedback.

Common Data Collection Methods
You don't need a large budget or a big team to get started. Use the tools you already have:

- Surveys – digital or paper
- One-on-one interviews – in person, by phone, or on Zoom
- Focus groups – small gatherings of stakeholders
- Social media – comments, polls, or open-ended prompts
- Consultants – helpful if you need external capacity or neutrality

What Kind of Questions Should You Ask?
The right questions will depend on your goals, but here are some ideas to get started:

- To build stronger relationships with nonprofits:
  - What makes applying for funding easier or harder?
  - How could we better support your organization beyond grants?
- To uncover pressing challenges:
  - What is something your community is struggling with that few people are talking about?
  - What barriers stand in the way of meaningful progress?
- To explore promising ideas:
  - What's working well that others should know about?
  - If you had unrestricted funding tomorrow, what would you invest in?

Self-Reflection

- Who are the key people or groups we want to hear from in our landscape scan?
- Which methods of data collection make the most sense for our capacity and context?
- What is one specific question we could ask that would help surface a new opportunity?
- How will we use what we learn to inform decisions or build relationships?

Module 3: Using Public Data to Inform Your Landscape Scan

We live in a data-rich world, and that's good news for your work. Even before you launch a survey or conduct interviews, you can begin understanding your community by exploring publicly available data.

This kind of early research gives you a foundation to work from. It helps you ask better questions and spot needs that might not be immediately visible or easy to talk about in a group setting.

External Data

- Quantitative
- Census data
- Industry data
    - Bureau of Labor Statistics
    - Industry Specific Organizations
    - Guidestar/Candid
- Government/Institutional sources
    - Foundation Research
    - University Research
    - Government Research (Local, Regional, and Federal) - The Government measures almost everything!
- How do we use it?
    - Demonstrates needs of the community
    - Broader community, regional, and national statistics
    - Best for broader trends, not hyper-local
    - Look for sources that have already compiled data to support an issue or region.

Why Use Public Data?

Data is being collected all the time—about economic trends, population changes, health indicators, education outcomes, and more. While much of it isn't specific to your foundation's mission, it can give you helpful insights:

- What are the unemployment or housing trends in your county?
- Are there gaps in access to education, healthcare, or childcare?
- What are the patterns around transportation, internet access, or workforce readiness?

This kind of information can uncover opportunities that are not being widely discussed—and that may not surface through traditional feedback channels.

Examples of Unspoken Needs
Some of the most important needs in a community are the hardest to ask about. For example:

- A quiet but growing demand for adult education classes
- A need for safe transitional housing options
- Limited access to basic healthcare services

Using data allows you to uncover these types of issues with sensitivity and discretion—and helps you prepare thoughtful follow-up questions.

Suggested Public Data Sources

- U.S. Census Bureau: https://data.census.gov
- County Health Rankings: https://www.countyhealthrankings.org
- Local United Way ALICE Reports
- State and local government open data portals
- School district or hospital system reports
- Chamber of Commerce or economic development data

Module 4: Understanding Collective Impact & the Role of Backbone Organizations

Overview
Collective impact is a structured approach to working together across sectors to solve complex challenges. At the heart of this approach is the idea that no single organization can solve large-scale community issues alone. Instead, progress happens when diverse groups commit to a shared agenda and coordinate their efforts.

One key part of making this work is having a **backbone organization**—a dedicated team or structure that supports the work behind the scenes.

TYPES OF BACKBONES	DESCRIPTION	EXAMPLES	PROS	CONS
Funder-Based	One funder initiates CI strategy as planner, financier, and convener	United Way of Salt Lake; Salt Lake City, UT	• Ability to secure start-up funding and recurring resources • Ability to bring others to the table and leverage other funders	• May lack broad buy-in if CI effort seen as driven by one funder • Potential perceived lack of neutrality
New Nonprofit	New entity is created, often by private funding, to serve as backbone	Community Center for Education Results (CCER); Seattle, WA	• Perceived neutrality as facilitator and convener • Potential lack of baggage • Clarity of focus	• Lack of sustainable funding stream and potential questions about funding priorities • Potential competition with local nonprofits
Existing Nonprofit	Established nonprofit takes the lead in coordinating CI strategy	Educate Texas; Rio Grande Valley, TX	• Credibility, clear ownership, and strong understanding of issue • Existing infrastructure in place if properly resourced	• Potential "baggage" and lack of perceived neutrality • Lack of attention to the CI initiative if poorly funded
Government	Government entity, either at local or state level, drives CI effort	Shape Up Somerville; Somerville, MA	• Public sector "seal of approval" • Existing infrastructure in place if properly resourced	• Bureaucracy may slow progress • Public funding may not be dependable
Shared Across Multiple Organizations	Numerous organizations take ownership of CI wins	Magnolia Place; Los Angeles, CA	• Lower resource requirements if shared across multiple organizations • Broad buy-in, expertise	• Lack of clear accountability with multiple voices at the table • Coordination challenges, leading to potential inefficiencies
Backbone of Backbones	Senior-level committee with ultimate decision-making power	Memphis Fast Forward; Memphis, TN	• Broad buy-in from senior leaders across public, private, and nonprofit sectors	• Lack of clear accountability with multiple voices

Hanleybrown, Kania, and Kramer, 2012.

*https://collectiveimpactforum.org/wp-content/uploads/2021/12/Backbone-Starter-Guide.pdf

The Five Elements of Successful Collective Impact Initiatives

According to the Collective Impact Forum, successful initiatives share five core components:

1. **A common agenda:** All participants have a shared vision and agreed-upon goals.
2. **Shared measurement systems:** Organizations measure and track results consistently.
3. **Mutually reinforcing activities:** Each participant undertakes work that complements and supports the work of others.
4. **Continuous communication:** Ongoing conversations build trust and ensure coordination.
5. **Backbone Support:** A dedicated team helps organize and manage the initiative.

What a Backbone Organization Does Not Do

To better understand the backbone's role, it helps to be clear on what it is not:

- It does not set the agenda. The agenda is created by the collective—usually through a steering committee informed by community input. The backbone helps gather and organize this input.
- It does not choose the solutions. The backbone supports participating organizations in aligning their efforts with the shared goals. It doesn't decide what each group should do.
- It does not control the funding. While the backbone needs support to operate, most funding should go to the implementation of programs, innovations, or services.
- It is not self-appointed. A steering committee or core leadership group selects the backbone based on trust, capacity, and alignment with the group's goals.

Typical Functions of a Backbone Organization

The backbone typically takes on roles such as:

- Facilitating meetings and keeping participants aligned
- Managing shared data and tracking progress
- Supporting communication across partners
- Coordinating logistics and timelines
- Supporting fundraising or grant reporting (when needed)

EARLY STAGE	MIDDLE STAGE	MATURE STAGE
• Fund data collection/ research to make the case for collaboration • Encourage grantees and stakeholders to collaborate • Encourage other funders to join the effort/align with other funders • Use convening power to draw key stakeholders to the table • Broker relationships to create open lines of communication between stakeholders • Participate on a Steering Committee	• Fund backbone infrastructure • Fund shared measurement systems • Fund trainings to increase stakeholder expertise in key collective impact skill sets • Fund research on evidence-based practices • Encourage grantees and other stakeholders to align evaluation to shared measures • Convene community stakeholders • Participate on working groups or Steering Committee	• Align funding with the common goals/measures of the effort • Continue to fund backbone infrastructure and shared measurement systems • Fund discrete initiatives identified through the effort • Provide content expertise • Continue to encourage grantees and other stakeholders to align evaluation to shared measures • Align/coordinate strategy with other funders • Participate on working groups or Steering Committee

Adapted from FSG's study of collective impact collaborations.

Setting the Scene — Then Stepping Back

One of the most important decisions a community foundation must make when supporting a collective effort is determining its role. Should your foundation serve as a funder? A fiscal agent? A backbone coordinator? Each role comes with opportunities — and responsibilities.

In many cases, your foundation may help launch or support an initiative. But sustaining momentum requires others in the community to take ownership. That's why it's important to set the scene well, then know when to step back.

As the article from the Stanford Social Innovation Review notes:*

> "Backbone organizations must maintain a delicate balance between the strong leadership needed to keep all parties together and the invisible 'behind the scenes' role that lets the other stakeholders own the initiative's success."

The same principle applies to your foundation's work across many areas — from multi-partner collaborations to grantmaking programs. Success often hinges on your ability to support and empower others while staying out of the spotlight.

Robert Woodruff said it well:

> *"There is no limit to what a man can do or where he can go if he doesn't mind who gets the credit."*

Letting go of credit and focusing instead on results is often what makes an impact agenda truly effective.

Module 5: Participatory Grantmaking — Sharing Decision-Making Power

As you've learned, landscape scans help you understand the needs and priorities of your community-based on their perspective, not just yours. Once you've identified the key issues, your approach, whether reactive (responding to urgent needs) or proactive (strategically investing in long-term goals), will help you decide how to allocate your grant budget.

Now we turn to how decisions are made. One powerful way to increase trust and transparency is through participatory grantmaking.

*https://ssir.org/articles/entry/channeling_change_making_collective_impact_work

What do we mean by participatory grantmaking?
There is no formal definition of participatory grantmaking, but practitioners doing this work agree that it:
- Emphasizes "nothing about us without us."
- Shifts power about grantmaking decisions by involving—or giving all power to—the people most affected by the issues or problems.
- Empowers and gives agency to people who benefit from funding to determine the priorities of their lives.

Participatory grantmakers consider the following to be core elements to this practice:
- Participatory grantmaking is values-based.
- The participatory grantmaking process itself is an important outcome.
- Participatory grantmaking is about more than money.
- Participatory grantmaking involves community in all parts of the grantmaking process, drawing on a wide range of other participatory practices.
- Participatory grantmaking's application and reporting processes are simple and flexible.
- Participatory grantmaking is transparent.
- Participatory grantmaking builds and strengthens larger social movements.

Participatory grantmaking means inviting community members, particularly those with lived experience or close ties to the issue, to help decide where grants go. Rather than only relying on foundation staff or board members, you open up the process to people who are directly impacted by the work.

This approach is not about handing over control, it's about sharing responsibility and recognizing that people closest to the work often have insights that funders don't.

You might start by involving community voices in:

- Recommending or vetting grantees
- Shaping the criteria for what makes a "strong" application
- Reviewing and scoring proposals
- Informing how success is defined and measured

Self-Reflection:
- Who is currently involved in making funding decisions at your foundation? Who is missing?
- What are the risks and benefits of involving community members in the grantmaking process?
- Could you test a participatory process with a small pilot grant program?
- What structures or safeguards would help you maintain transparency and consistency if you invited others into your decision-making process?

Dynamics of Community-Centric Grantmaking and Agenda-Setting
Landscape scans allow funders to determine what the needs are in the community. Developing grant programs and community impact agendas that respond to these needs can be either responsive or strategic. Community Foundations will likely have both types of grantmaking programs.

Reactive/Responsive grantmaking:
- Flexible, open process
- Application is open to any nonprofit to submit
- Programs for disaster relief

Strategic/Proactive grantmaking:
- Thoughtful RFP/LOI or application process
- Metrics for success

Module 6: Balancing Reactive vs. Proactive Grantmaking — A Strategic Approach

As you consider your community impact agenda, you'll likely encounter key questions:

"If we're too responsive in our grantmaking, giving only to those who seek us out, how are we being strategic? And if we're only proactive, funding only efforts we uncover, what important opportunities might we miss?"

There's no right or wrong way to approach this, but the key is intentionality. You must choose an approach based on your foundation's values and goals, and understand the pros and cons of both approaches. Let's break it down.

Reactive/Responsive Grantmaking
Responsive grantmaking is often a more flexible, open process. It's about being open to what emerges in your community and responding to nonprofit organizations and individuals who seek your support. The application process is generally open and accessible, offering broader-based support for various groups and issues. This can be a great way to:

- Get to know community needs and groups
- Support emerging projects or urgent needs
- Keep the foundation flexible to new opportunities

However, there are challenges:

- It can be time-consuming for both the foundation and grantees.
- It may be harder to measure progress toward long-term community goals.
- It can feel less strategic, especially when you're not guiding where the funds go.

Proactive/Strategic Grantmaking

Proactive or strategic grantmaking is focused on achieving specific philanthropic goals. With this approach, you actively seek out solutions to issues you identify through research, community input, and analysis.

Key benefits:

- You create a roadmap for addressing key issues in your community.
- Your grants are more likely to support systems change and long-term impact.
- You can capitalize on opportunities for learning, leverage, and leadership.

The challenges here include:

- Requires significant investment in research and strategy development.
- Needs extensive stakeholder input, including community engagement, to ensure it's aligned with real needs.
- It may seem less accessible to some smaller or less-established organizations if the application process is too narrow.

Self-Reflection:

- What is your current approach to grantmaking—more reactive or proactive?
- What are the benefits and challenges of each approach within your organization's context?
- How much of your portfolio do you want to allocate to responsive versus strategic programs?
- If you're mostly reactive, how could you start to shift to a more strategic approach in a transparent and clear way?
- How will you communicate this shift to your stakeholders, grantees, and the community?

Strategic & Responsive: Finding the Balance
One of the most significant advantages of strategic grantmaking is the potential for systems change. This is especially true for community impact agendas that aim to transform systems or build fields. However, this doesn't mean that responsive grantmaking doesn't have an important place in your foundation's work.

For example, disaster response funds or urgent community needs still require reactive funding. It's important to think about the balance:

- How much of your portfolio will be allocated to responsive programs?
- Should you set aside a specific percentage (10%, 30%, 80%) for responsive grants?

As you move forward with setting your community impact agenda, you'll need to consider how to balance these two approaches based on your goals. You may even find that a combination of both is the most effective way to create lasting change while responding to urgent community needs.

Action Activity: Begin Jotting Down Ideas for Your Community Impact Agenda
As you start developing your community impact agenda, it's helpful to break the process down into a few key components. Use the following questions to guide your thinking:

1. What is the overarching goal or mission of your community impact agenda?
    a. .Is it addressing an urgent need or a long-term challenge?
    b. What tangible, measurable outcomes do you hope to achieve?
2. What data will help guide this work?
    a. What kinds of data do you already have access to? (Public data, surveys, community reports)
    b. What additional data might you need? (Qualitative data like interviews, focus groups, etc.)
    c. What gaps exist in the data you currently have?
3. What is your timeline for launching the initiative?
    a. What are your immediate goals and milestones for the next 6 months, 1 year, 2 years, etc.?
    b. How much time do you need to gather data, plan, and execute the agenda?
4. What is your estimated budget?
    a. How much funding do you need to execute your agenda?
    b. Where will the funding come from? (Grants, fundraising campaigns, partnerships)

Who Needs to Be at the Table?

In this step, you'll want to think about who will help make your community impact agenda a reality. Use the matrix below to map out key leaders, expertise, and lived experience that should be part of the conversation.

This matrix will help ensure you're bringing in a variety of voices, perspectives, and resources — avoid creating an echo chamber where only a small subset of voices are heard.

Community Impact Table Mapping Matrix

Category	Who Needs to Be at the Table?	Why They're Important
Community Leaders	Local elected officials, business leaders, neighborhood leaders	They offer insight into community needs, priorities, and relationships with key groups.
Experts	Educators, healthcare professionals, environmental specialists	They bring specialized knowledge to help shape solutions and strategies.
Lived Experience	Residents from impacted communities, those with first-hand knowledge	They can speak to real challenges and needs, ensuring the work is relevant and meaningful.
Nonprofits	Local service providers, grassroots organizations, and partners	They can offer insights on program implementation and existing efforts.
Funders	Other philanthropic organizations, corporate sponsors, donors	They help provide resources and help align funding efforts with community needs.
Other Stakeholders	**Consultants, media partners**	**They can play roles in communication and larger-scale impact**

Self-Reflection:

- What do you see as the most pressing needs in your community that your impact agenda could address?
- What data would most help you understand these needs and measure progress toward solutions?
- Do you have access to all the data you need? If not, what additional research or data collection do you need to plan?
- What timeline makes sense for the launch of your community impact agenda?
- What budget will you need to support your work, and what funding sources could you tap into?
- Who are the key stakeholders who need to be part of the conversation to ensure success?
- Are there any community voices that might be missing from the process?

This is a great place to start the process of building your community impact agenda. By identifying your goals, gathering data, defining the timeline and budget, and mapping out key stakeholders, you'll be well on your way to crafting an agenda that truly serves your community.