



Community Impact Agenda Setting

Class 2 - Community Leaders

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Estimated time to complete: 1 hour

Class Objectives

- Community Foundation boards:
 - Role of a member
 - Responsibilities/expectations
 - Fiduciary responsibilities
 - Composition
 - Community-centric fundraising practices
- Strategies to identify and recruit leaders.
- Effective training and onboarding for leaders and board members.
- Succession planning and good governance.
- Managing Leader and Board Dynamics:
 - Balcony Perspective
- Identify leaders who exemplify the principles of community-centric fundraising and who are implementing solutions that work.



The process of choosing the right leaders to sit at the table is crucial in shaping the community impact agenda. The right mix of leaders will help drive the agenda forward, while the wrong mix can create friction that hinders progress.



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Self-Reflection:

- Leadership Characteristics:
 - What specific qualities and expertise are you looking for in the leaders who will help advance the community agenda?
 - Which leaders in your community already have a reputation for fostering collaboration and moving projects forward?
- The Role of Leadership in Progress:
 - Have you experienced a situation where a leader's behavior or attitude negatively impacted a group decision or progress? How did that play out?
 - What qualities or behaviors might you want to avoid in a leader to ensure the success of your community impact agenda?
- Building the Right Team:
 - How will you ensure multiple perspectives are at the table while maintaining a collaborative, productive environment?
 - How do you plan to balance the needs of individuals or organizations with the larger community needs when selecting leaders?

Action Activity:

1. Role Play Scenarios:

- a. Imagine a meeting where two or more leaders are not agreeing. What strategies can you use to manage conflicts and keep the group focused on the bigger picture?
- b. Reflect on times you've witnessed or experienced difficult group dynamics. How did leadership step in (or fail to step in) to keep the group moving forward?

Module 1: Roles and Responsibilities of Community Leaders





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Defining Key Leadership Roles for Community Impact

When developing a community impact agenda, it's essential to clearly define the roles that will drive success. The three key roles include governance, fundraising and stewardship, and community ambassadors. Each plays a critical part in ensuring the initiative stays on track and achieves its goals.

Governance

Governance ensures that the strategy and policies are aligned with the shared vision. It provides oversight and holds working groups, committees, and the backbone organization accountable. The leadership team must consistently assess progress and make necessary adjustments.

Fundraising & Stewardship

Community leaders are expected to contribute time, talent, and treasure to support the initiative. They will use their networks and fundraising abilities to engage others in contributing to the initiative. Leaders should model the commitment they hope to inspire in the community.

Community Ambassadors

Community Ambassadors share the successes of the initiative. They are in tune with the community's pulse and can anticipate support needs or opposition. Their deep connections help steer the initiative toward success.

Action Activity: Identifying Leadership Roles

1. List the key leaders in your community who could fill each of these roles. Consider individuals with the right skills and connections.
2. Assign a role for each leader, ensuring that all three areas (governance, fundraising and stewardship, and community ambassadors) are covered.
3. Discuss how each leader's contribution will help move the community impact agenda forward.

By defining these roles and responsibilities, you'll establish a strong foundation for collaboration and success.



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Ethics and Values

Community leaders should uphold the highest ethical standards and embody the values of the community impact initiative. Before starting any of the messy work, consider:

- What organizations or agencies needs to be at the table? Who from this organization is best suited to serve?
- How to establish community agreements?
- How to balance the differing interests of many entities and leaders?
- If grantmaking is part of the process, how to do this in a way that is fair?

What else would you add? What hurdles or challenges have you faced when doing this work that lie in the grey area of ethics and values?

Module 2: Navigating Ethical Decisions in Community Leadership

When different types of community leaders come together, balancing personal or organizational interests with the greater good can be challenging. Ethical dilemmas are inevitable, especially when making decisions that affect the community's future. The key to managing these challenges is defining and adhering to the values that guide your collective work.

It's important to articulate the core values early on to ensure that ethical issues can be addressed transparently and thoughtfully. These values provide a framework for decision-making and help guide actions during uncertain or contentious times.

Case Study: The Crestview Revitalization Dilemma

In the small town of Crestview, community leaders formed a task force to revitalize the town's main street, which had suffered from years of economic decline. They faced two major challenges: policy changes to support new businesses and securing funding for redevelopment.

Greenway Development, a large company, offered significant funding but requested exclusive development rights in exchange. The task force faced a tough decision: accept Greenway's funding, potentially sacrificing the town's character, or risk continuing the town's decline without external resources.

Some leaders, like Leah, worried about the loss of the town's heritage, while others, like John, argued that Greenway's involvement was crucial to the revitalization. The debate sparked a deeper conversation about how to balance the financial needs of the community with its values.



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Proposed Solution

Leah suggested a compromise: work with Greenway but ensure that the redevelopment preserved Crestview's cultural integrity. This included dedicated spaces for local businesses, affordable housing, and a community advisory board to oversee the project. The task force ultimately negotiated these terms with Greenway, who agreed to some of the provisions, though not all.

Through careful negotiation and community engagement, the task force ensured that the redevelopment project would serve the community while securing necessary resources. The revitalization included both new businesses and protections for local enterprises, creating a balanced solution that respected both development and community values.

Key Takeaways

1. **Clarity of Values:** Defining clear values from the outset ensures that difficult ethical decisions can be made with a shared sense of purpose.
2. **Compromise and Negotiation:** Ethical challenges often require a balance between competing interests. Negotiating with transparency and flexibility can lead to mutually beneficial outcomes.
3. **Community-Driven Solutions:** Engaging the community in decision-making fosters trust and ensures that outcomes reflect the collective will and needs of the people.

Action Activity: Ethical Decision-Making

1. Reflect on a recent decision or scenario in your community or organization where values were tested.
2. How did you or your team approach the ethical dilemma? What values guided your decision-making process?
3. If you were to face a similar situation again, how might you handle it differently?

By grounding decisions in shared values and ethical considerations, leaders can navigate challenges more effectively and create solutions that benefit everyone in the community.



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Module 3: Strategies to Identify & Recruit Community Leader

- Write a job description
- Continuous skills assessment of current members
- Ask leaders who they know
- Consider current partners of community foundation
- Consider leaders who have influence in community
- Align values and purpose to your recruitment efforts

Recruiting the right leaders for your community foundation is crucial to achieving your mission. Recruitment is a two-way street, and it's important to ensure that both you and the candidates understand what's expected.

Step 1: Create a Clear Job Description

Start by drafting a clear and compelling job description that outlines the expectations for board members. Include the following key elements:

- **Time Commitment:** Be specific about how much time is expected for meetings, events, and other responsibilities.
- **Donation Commitment:** Outline the financial contribution or fundraising goals expected of board members.
- **Responsibilities:** Detail what the board member's role will involve, including governance, strategic planning, fundraising, and community engagement.

Step 2: Develop Leader Profiles

Think about the skills and qualities you need to fill the gaps on your board. Develop profiles of the types of leaders you're looking for, considering factors like:

- **Different kinds of expertise:** Do you need someone with legal, financial, or marketing experience? What about someone with community organizing experience?
- **Personal traits:** Consider the types of values and leadership styles that would be a good fit for your team. Are you looking for someone who is more hands-on, or someone who is strategic and visionary?



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Step 3: Leverage Your Current Board

Your existing board members can be invaluable in helping identify potential candidates. Ask them who they know who aligns with the profiles you've developed. Encourage them to think beyond their immediate networks and consider individuals who may bring new perspectives or skill sets.

Step 4: Interview Candidates

Don't rush the process — take the time to interview potential board members, even if they come highly recommended. Ask about their previous board experience, commitment to the mission, and how they plan to contribute. This is your opportunity to assess if they're the right fit for the role and the culture of your organization.

By clearly defining the role and expectations, and by taking a thoughtful and intentional approach to recruitment, you'll build a stronger, more engaged board that is aligned with your foundation's mission and values.

Module 4: Effective Training & Onboarding for Community Leaders

- Have a formal process for onboarding new members
- Rotating terms so that onboarding and offboarding sync
- Start with vision and values, work of the initiative
- Job description
 - Outlines role and responsibilities
 - Time commitment
- Make it fun! Socialize!



Once you've recruited new members, it's crucial to provide a structured and welcoming onboarding process to ensure they feel supported and connected to your organization. A clear onboarding process can help new board members integrate smoothly and understand their roles and responsibilities from the start. Here's what to include:



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1. Outline the Onboarding Schedule

- **Meetings:** Provide a schedule of upcoming board meetings and key events. This will help new members plan their participation.
- **Committee Assignments:** Assign them to specific committees and share the meeting schedules for those groups as well.
- **Key Contacts:** Identify who to contact for different needs (e.g., logistics, governance questions, fundraising).

2. Ensure Clear Communication

- **Communication Channels:** Specify how the team communicates. For instance, will they use email, Slack, or another platform? Should they contact an assistant or a scheduling bot for meeting availability? Make sure everyone knows how to reach out when they need information or assistance.

3. Sync Onboarding with Offboarding

If your governance structure involves term limits, it's a good practice to sync onboarding with the offboarding of outgoing members. This provides an opportunity for new members to learn from their predecessors, receive valuable insights, and create a smoother transition.

4. Define Expectations and Consequences

Be transparent about the responsibilities of board members and the consequences for not meeting these expectations. For example:

- **Meeting Attendance:** If a member misses two consecutive meetings, will they be removed from their role? What kind of warning system will be in place?

5. Make It Fun!

Onboarding doesn't have to be all business. Leaders who feel personally connected to the organization are more likely to stay engaged and contribute. Plan activities that foster bonding and encourage a sense of community. For example, casual gatherings or social events can help build relationships outside of formal meetings.

By having a structured, clear, and engaging onboarding process, you'll ensure that your new board members feel welcomed, supported, and ready to contribute to the community foundation's success.



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Module 5: Succession Planning & Good Governance

Oftentimes community foundations serve as the quarterback organization to start up a community-impact agenda or initiative. As the initiative takes shape and grows, it's important to consider whether or not the leaders around the table are the right leaders to support this growth and change. Regularly thinking about succession planning and establishing strong governance practices will smooth leadership transitions.

- As the initiative matures, establish a nominating committee
- Think ahead: What skills, networks, influence are you losing with the retirement of a member?
- Right-sizing: How many members do you need to effectively oversee the community initiative? Will this become the board for the spin-off organization (if applicable)?
- See how the potential new member does with current board members; weave this into the interview process.
- As the needs of the community initiative change, modify the make-up of the commitment/task force

Robert's Rules of Order



Many nonprofits follow Robert's Rules of Order, a parliamentary procedure first published in 1876 by Henry Martyn Robert that provides a standardized framework for conducting meetings.



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Adhering to these rules can keep your meetings consistent and efficient. On the other hand, Robert's Rules can be dense and overly complicated, offer limited flexibility, and can make it difficult for less-represented perspectives to be heard.

Managing dynamics among passionate and experienced leaders is a crucial part of your role as senior leaders in a community foundation. Balancing voices and perspectives, from the Chief of Staff to the Mayor to a community organizer, is essential to creating a productive and inclusive environment.

A strong partnership between the backbone organization leader and the chair of the working group is vital in ensuring that managing these dynamics doesn't become your full-time job. Here's how you can approach it:

1. **Clarify Roles and Support:** Be clear with the chair about how you will support one another in managing the group. Set expectations for how both of you will collaborate to ensure balanced participation.
2. **Maintain a "Balcony Perspective":** The chair must remind members to keep a higher-level view of the process, focusing on strategic direction rather than day-to-day operations—unless asked to dive into the details. This ensures productive discussions without getting bogged down.
3. **Communication and Preparation:** Establish clear communication practices with your leaders. Decide how often to contact them and whether you should preview topics before meetings to ensure they come prepared.
4. **Set Clear Evaluation Metrics:** Ensure you have clear KPIs in your role as the backbone organization leader. Regular evaluation from the board helps maintain accountability and ensures your leadership aligns with the organization's goals.
5. **Effective Meetings:** Use Robert's Rules of Order to structure meetings effectively. Every board member should have a voice and vote, with the expectation that the majority will determine decisions.

Conclusion

In conclusion, building and maintaining strong leadership for your community impact agenda requires careful planning, clear communication, and a focus on the bigger picture. By ensuring that all voices are heard, roles are well-defined, and dynamics are managed with intention, you can create a collaborative environment that drives meaningful change. Remember, leadership is not just about managing meetings — it's about building relationships, holding each other accountable, and making sure that every member is committed to the shared vision and goals. As you move forward, keep these principles in mind to cultivate a leadership team that will help bring your community impact agenda to life.