



Community Impact Agenda Setting

Class 3 - Community Impact Agenda Setting

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Estimated time to complete: 2 hours

Class Objectives

- Introduce Place-based Initiatives, including the role of quarter-back/back-bone organizations and partnerships.
- Understand systems-level or systemic change and the components to create lasting change in an issue area.
- Understand the principles of trust-based philanthropy and participatory grantmaking and how to incorporate these into your grantmaking and convenings
- Discuss the opportunities and burdens of site visits.
- Distinguish impact metrics from vanity metrics, especially as it relates to systems-level change.
- Commit to transparency with grantees and community leaders.

Module 1: Imagine you're a playwright.

In Session 2 of Community Impact Agenda, you set the stage, scanning the community, identifying opportunities for collaboration, and defining the goals that would guide your work. You cast the characters, bringing together the voices, experiences, and expertise needed to tell a meaningful story.

Now, it's time to write the dialogue - not the neat "once upon a time" that ends with "happily ever after," but the real, often messy, conversation that community work requires.

Today's session is about that complexity: surfacing the issues, exploring potential solutions, questioning those solutions, and unpacking the many layers of consideration that come with driving real, lasting change.



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The table you've set will spark productive conversation and creative ideation. People will listen, really listen, and build on one another's ideas. You might land on a concept that shines on the surface, but once you dig deeper, you realize it's all smoke and no substance.

Other times, just testing an approach will ignite tension, maybe even heated debate, before you've engaged a single person outside the room.

That's all part of the process.

The strategies and lessons from the previous class will help you navigate these moments, moving the conversation forward and shaping ideas into compelling, community-driven initiatives.

Module 2: Collective Impact and Place-Based Approaches

Setting a Collective Impact Agenda

Creating a collective impact agenda is not just about identifying a problem or launching a program, it's about building a long-term, strategic, and collaborative approach that has the power to shift systems. This kind of work takes time, trust, and shared commitment. It requires everyone with a stake in the issue to show up, align on a shared vision, and work together toward meaningful change.

The following five conditions are needed to build alignment and drive lasting results:

1. **A Common Agenda**
2. **Shared Measurement Systems**
3. **Mutually Reinforcing Activities**
4. **Continuous Communication**
5. **Backbone Support Organizations**

These aren't just technical checkboxes—they represent deep relational work across organizations, communities, and stakeholders.



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Self Reflection:

As you consider these five conditions, take a few moments to reflect on the following:

- Which of the five conditions feels most achievable in your context? Which feels most out of reach?
- Can you think of an example in your community where multiple partners came together around a shared issue? What helped or hindered that collaboration?
- What role does trust play in aligning across sectors or organizations? Where have you seen trust support—or block—collective action?
- What's your reaction to the idea of “backbone” support? What qualities make an effective backbone organization?

Pause & Imagine

Do you think all five conditions could ever realistically be met in your community?

- If not, what would need to change for it to become possible?
- If yes, what role could you — or your organization — play in helping get there?

Your Role as a Community Foundation

Community foundations often sit in a unique position of influence and trust. Consider:

- What responsibility do community foundations have in advancing change?
- What power do you hold to convene, align, or resource this kind of work?
- What are the risks or limitations of stepping into a more active role?

Place-Based Strategy

According to the Milken Institute* successful place-based philanthropy strategy requires:

1. **Laser focus on systems change.** For a problem as complex as poverty, for example, addressing it at the local level may be the best bet for creating transformative change. Understanding the particular context and focusing on the specific needs of the community can help you deploy a targeted, flexible, and comprehensive set of approaches to the problem at hand. The result is often a win-win combination of community-anchored systems change.



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2. **Deep listening and partnership.** A place-based approach allows philanthropists to create more easily the conditions for meaningful listening and engagement with communities. Time and again, social change experts stress the necessity of community participation, buy-in, and trust for a philanthropic effort to be successful. Demonstrating a long-term commitment to an area is one way to build that trust and partner with communities.
3. **Experimentation, learning, and innovation.** Donors, together with the community, can innovate and experiment with bold solutions. Indeed, philanthropy's role is to be innovative, make mistakes, and to adapt and evolve. Compared to other funders such as governments and private investors, philanthropists are not tied down by performance or investment return criteria. Therefore, philanthropists can provide funding that is catalytic, risk-taking, and patient, but not permanent.

Place-Based Initiatives: Driving Systems Change Where It Matters Most

One of the most powerful approaches to strategic, systems-level change is the place-based initiative — and community foundations are uniquely positioned to lead it.

You know your communities. You've done the landscape scan. You can see where alignment is needed and where opportunities for impact are greatest. You are trusted conveners who can bring people together around a shared vision.

But what is a place-based initiative?

A **place-based initiative** is a long-term philanthropic strategy focused on a specific geographic area. It aims to create **systemic change** by bringing together multiple stakeholders—nonprofits, funders, public agencies, and residents—to tackle complex challenges that no single organization can solve alone.

The Heart of the Work

Place-based initiatives require:

- A goal larger than any one organization
- Collaborative compromise, where every partner gives up something so the community gains everything
- Shared credit and collective ownership of results
- A laser focus on systems change
- Deep listening and authentic partnership
- Experimentation, learning, and adaptation

This work is not about quick wins. It's about long-term commitment to transformation.



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Self-Reflection

- Take a moment to reflect on how this might look in your context:
- What geographic area or neighborhood in your region is ripe for place-based investment?
- What systemic issue – education, housing, public safety, economic mobility – feels most urgent in that place?
- Who are the natural allies you could bring together around a common agenda?
- What would your foundation need to do differently to support long-term, collaborative work instead of short-term, siloed efforts?
- How do you stay grounded in the voices of residents and communities most impacted?

"How to Fund Place-Based Partnerships if we want them to work"

"Healthy, vibrant communities must be supported by a complex, interlocking web of efforts and systems."

"Backbones are structures comprised of a single or multiple organizations that fulfill several core functions and facilitate action and accountability across place-based partnerships. These structures, which serve as the glue for place-based partnerships, face a particular challenge when it comes to making the case for funding their work: they don't provide the traditional "direct service" work often preferred by funders. Instead, they do the critical work of organizing, planning, coordinating resources, and analyzing data to drive community level outcomes."

Fundraising for Place-Based Partnerships

Centering Community Over Competition

When community foundations step into place-based initiatives, a common early question is:

"Who does the fundraising?"



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It's true – many of these partnerships begin without a designated backbone organization or clear fundraising plan. So how does it get started?

Sometimes a donor (or a few) is inspired to fund early planning efforts. You may have DAF holders who are especially aligned with the values of collaboration and long-term impact. There are also national and regional funders increasingly interested in place-based, systems-level work – especially when it's community-driven.

But as you begin fundraising, we encourage you to revisit a core concept introduced earlier in this curriculum: Community-Centric Fundraising.

Module 3: Reexamining Your Fundraising Mindset

Let's revisit the second principle of community foundations:

Individual organizational missions are not as important as the collective community.

We've all been trained to fundraise for our own mission, to protect our lane, and to compete for limited dollars. But in place-based work, that approach can backfire. When organizations compete instead of collaborate, we risk creating a “tragedy of the commons” – where our organization wins in the short term, but the community loses in the long term.

If we're serious about placing the community at the center of our decision-making, we must be willing to:

- Evaluate which grants or donors are a true fit for the collective effort
- Step aside or decline funding opportunities when others are better positioned to lead
- Regularly assess whether our mission is still responsive to community needs
- Consider merging, adapting, or even stepping back if our presence hinders broader goals
- Invest in our staff and board as ecosystem leaders, not just internal performers

This is hard work. It requires humility, trust, and long-term thinking. But it's the only path to real, lasting change.



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Self-Reflection:

- What tensions exist between your organization's fundraising needs and the needs of the collective?
- How could your foundation help model or encourage shared fundraising strategies?
- Are there local donors or DAF holders who might be excited to fund collective work rather than individual organizations?
- What internal conversations would you need to have with your team or board to embrace a community-centric approach?
- When was the last time your mission was evaluated against the current needs of your community?

Module 4: The Role of Site Visits in Collective Impact

Learning Beyond the Application

Site visits are a powerful way to connect directly with the nonprofits and community partners working on your collective impact agenda. While data, applications, and reports are important, many people gain a deeper understanding by seeing the work firsthand.

Seeing a program in action can tell you what a proposal cannot.

In traditional grantmaking, site visits may be used in different stages of the process:

- Pre-grant: As part of due diligence or discovery
- Post-grant: To assess how funds are being used and learn from impact stories

Regardless of timing, **site visits require care and intentionality.**

They should never become an additional burden for nonprofits — especially those with limited capacity. A visit by a task force or funder should be an opportunity for mutual learning, not performance or pressure.



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Guiding Principles for Effective Site Visits

- Be clear about the purpose of the visit
- Limit the number of attendees — small, respectful groups are best
- Prepare in advance so your hosts aren't scrambling
- Follow up with gratitude and share what you learned

When done well, site visits can build trust, deepen relationships, and lead to more informed, equitable funding decisions.

Module 5: Evaluation as Accountability and Impact

Why Evaluation Matters in Collective Impact Work

Your task force has likely discussed or developed a theory of change — a shared understanding of how your efforts will lead to the desired impact. But how do you make sure you stay on course?

That's where a well-designed evaluation framework comes in.

Evaluation isn't just a reporting requirement — it's a strategic tool. It helps your task force:

- Stay focused on shared goals
- Resist mission creep or the influence of a single persuasive voice
- Make decisions based on real impact, not assumptions
- Keep momentum by learning what works (and what doesn't)



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The Role of Evaluation at a Community Foundation

A strong evaluation plan does three things:

1. **Advances Purpose** - It links back to your mission and theory of change, ensuring your efforts are aligned with what matters most to your community.
2. **Increases Support** - Donors and stakeholders are more likely to invest when they see measurable progress and meaningful outcomes—not just outputs or activities.
3. **Supports People** - Evaluation holds you accountable to your board, staff, donors, and—most importantly—the community you serve. It helps you answer: “Are we really making a difference?”

4 Components of Evaluation



Understand Impact: Measure outcomes and impact with a focus on systemic impact.



Right Size: The value of data collected must exceed the cost to collect it.



Collect Actionable Data: avoiding burden on grantees/partners to collect unnecessary data that will not be used.



Foster Collaborative Learning: Building on what others have already learned rather than starting from scratch.

Four Core Components of Meaningful Evaluation

Evaluation can feel technical, but at its heart, it's a tool for learning, accountability, and community transformation. Let's explore the four essential components of effective evaluation for community foundations engaged in systems-level work.



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1. Understand Impact

Focus on root causes and systemic outcomes – not just surface-level symptoms.

Story to Consider:

Imagine you come across a pond full of dead fish. Your first instinct may be to treat the fish or remove them. But if you look upstream, you may discover pollution entering the water. Solving the problem means addressing the pollution—not just removing the symptoms.

This is **systems thinking**. Instead of focusing only on short-term outputs (like attendance at an event), ask:

- What deeper issues are we trying to address?
- Are we shifting the systems or conditions that created the problem?

2. Right-Size the Approach

The value of the data should exceed the cost of collecting it.

Have you heard the phrase, “Is the juice worth the squeeze?”

If collecting a certain data point costs nonprofits time, money, or energy – make sure it’s worth it. Better yet, support them to collect it.

If your foundation isn’t resourced to fund evaluation costs, consider simplifying your requirements.

Ask:

- What must we know?
- Can we learn it through a conversation, site visit, or short report?

3. Collect Actionable Data

Only ask for what you’ll use.

Grantees are on the front lines. Don’t treat data collection as a hoop – they’re partners, not contractors.

Respect their time and capacity by only requesting data that:

- Informs decisions
- Helps you improve your own work
- Can be shared meaningfully with stakeholders



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4. Foster Collaborative Learning

Learning should be shared, not siloed.

We're stronger when we learn together. Evaluation should feed into conversations— with staff, grantees, donors, and other funders. This reduces duplication and strengthens the sector as a whole.

You don't have to write a white paper. Share findings in whatever way makes sense:

- Infographics or briefs
- Community learning sessions
- Peer calls with other funders or grantees

Centering Community

To evaluate a grant program effectively, it's imperative to set clear expectations at the start of the grant. This helps ensure that both the funder and the grantee have a shared understanding of how impact will be measured and reported.

- It's imperative that you set clear expectation at the start of the grant to ensure that your grantee can report impact.
- Community Foundations and nonprofit grantees must agree on objectives and metrics that will be evaluated.
- Set objectives with an understanding that things may not go as planned. In these cases, determine what your action will be and communicate with the grantee.
- What are the costs associated with gathering metrics of success? Allow the nonprofit to build these costs into their grant budget.
- Balance the unique triangular relationship between the donor, community foundation, and nonprofit.

***Ask yourself what does success look like? Is it learning? Outreach?
Expanded programs?***

***Then ask, what will it take (financially, socially, timing, leadership, etc.) to
achieve success? What, if any, trade-offs will there be?***

Module 6: Setting Clear Expectations for Grant Impact

To ensure meaningful outcomes, it is essential that you set clear expectations at the beginning of the grant process. This helps ensure that grantees are aligned with your community foundation's goals and can report on their impact effectively.



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Key Principles:

1. Focus on Transparency and Shared Goals

Community Foundations and nonprofit grantees need to agree on objectives and metrics that will be used to evaluate success. These should not be assumptions; engage your grantees in conversations to understand what measures are most meaningful to them.

While it's important to allow for individual goals, having a common metric across all grantees can help you track and compare success. For example, if you fund education initiatives, you might decide that tracking matriculation rates year over year will be a shared measure of success across all grantees.

2. Expect the Unexpected — Flexibility in Goals

Things may not always go as planned. Recognize this and have a contingency plan in place. If a grantee needs more time to complete the project, how will you respond? Consider the possibility of granting extensions or other forms of support.

3. Understanding the Costs of Measurement

Collecting data and reporting on impact takes resources. Nonprofits should be able to include the cost of collecting success metrics in their grant budgets. Make sure these costs are factored in from the start.

4. Balancing Relationships in the Triangle of Funders, Foundations, and Nonprofits

The relationship between donors, community foundations, and nonprofits must be balanced when establishing evaluation metrics. Ensure that metrics do not just benefit one partner (e.g., funder) but also align with the nonprofit's mission and the community's needs.

5. Defining Success and Achieving It

Success can look different depending on your community and goals. It could be learning, outreach, or expanded programs. Think about what success means in the context of your grant and the community you're working with.

Once you define success, ask yourself: What will it take to achieve this? Consider factors like funding, timing, and leadership, and reflect on the trade-offs involved in pursuing success.



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Module 7: Vanity Metrics vs. Impact Metrics

In this module, we will explore the important distinction between vanity metrics and success metrics (impact metrics) and why this matters in your grantmaking and community work. Understanding the difference will help ensure you are focusing on the right indicators to measure the true impact of your investments.

Vanity Metrics: All That Glitters Isn't Gold

Definition: *Vanity metrics* are measurements that look impressive on the surface but do not provide real insights into impact or outcomes. These metrics are often easy to capture and quantify, but they fail to reflect the true value or change driven by a program or initiative.

Examples of Vanity Metrics:

- Number of social media followers
- Website visits
- Number of people attending an event (without assessing their engagement or outcomes)
- Amount of money raised (without showing how it was used or its effect)

Why They Can Be Misleading:

Vanity metrics may give a sense of achievement or popularity, but they don't directly correlate with the long-term changes you want to see in the community. They are often easy to manipulate, but they fail to answer "so what?" — meaning they don't tell you whether your actions actually had the desired effect.

Impact Metrics: Measuring What Matters

Definition: Impact metrics focus on outcomes, system improvements, and behavioral changes. These metrics assess the broader effects and long-term changes that have occurred as a result of a program, initiative, or intervention.

Examples of Impact Metrics:

- Behavioral changes in participants (e.g., improvements in skills, health, or knowledge)
- Increase in community engagement or collaboration
- Reduction in disparities (e.g., educational attainment, income inequality)
- Systemic changes (e.g., new programs launched as a result of the initiative)

Why They Matter:

Impact metrics focus on the end result, how your work is changing people's lives, improving systems, or shifting communities in meaningful ways. They answer the "so what?" question and provide real evidence of the difference you are making.



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Module 8: Building Trust and Setting Expectations for Evaluation

Changing your evaluation process can get messy. It will take time, intention, and many conversations, but it's essential to creating a meaningful, sustainable impact. Let's dive into how you can build trust with your grantee partners while navigating the changes in your evaluation processes.

It's OK to Get Messy

Your good intentions might unintentionally add more work for the grantees or leaders in the community. This is normal, especially when you are learning and adjusting. The key is to approach this process with transparency and openness. When you approach evaluation with humility, acknowledging that you are learning, it helps build trust. Here's how you can make it work:

1. **Be Transparent:** Let your grantees know that you are committed to values that center on learning. It might feel a little bumpy at first, but the goal is to improve the process for everyone.
2. **Be Open About Expectations:** Talk to your grantees about what information you will need from them in the reporting process. Let them know upfront what metrics they need to track, so they can collect data as they go instead of scrambling later.



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Module 9: How Will You Communicate Expectations?

Clear and open communication is essential for building trust and setting expectations. Here are a few methods to consider for communicating expectations to your grantees:

1. Grant Agreements:

- Ensure that the agreement includes what is expected from the grantee in terms of data collection and reporting. Make sure your agreement is flexible so that it allows space for learning and adjustment as you go along.

2. Kick-Off Call or Meeting:

- A great way to ensure alignment from the start. Use this time to answer any questions and provide clarity about the goals, data needs, and reporting structure. This is especially helpful for first-time grantees.

3. Evaluation Guidebook:

- Providing a guidebook that explains the evaluation process, reporting expectations, and definitions of key terms can make the process clearer and more consistent for all parties.

4. Email Communication:

- Use email to remind grantees of key deadlines and provide reminders about what information is needed. This can be automated via your CRM tool for efficiency.

5. Site Visits:

- Meeting in person or virtually can provide opportunities to check in, build relationships, and reinforce the importance of data collection and evaluation.

6. Website:

- Consider creating a section of your website to explain how evaluation ties into your values and principles. This transparency builds understanding and accountability.



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Conclusion

This class has emphasized the power of place-based philanthropy, where collaboration, shared goals, and systems-level thinking drive long-term impact. By conducting site visits, you gain firsthand insight into the community's needs and can build trust with grantees, ensuring alignment and transparency. We also explored the importance of using meaningful metrics and robust evaluation to measure impact. Shifting from only using vanity metrics to also using outcomes-based evaluation ensures your work is focused on creating real, sustainable change.

Remember that effective evaluation isn't just about collecting data – it's about building trust, setting clear expectations, and working collaboratively with your grantee partners to create lasting impact. By focusing on transparency, shared goals, and open communication, you'll be able to make more informed decisions, refine your approach, and ultimately drive the kind of systemic change that benefits your entire community.

Evaluation is a tool for learning and growth, not just accountability. It allows you to stay focused on the bigger picture and ensures that your efforts are making the difference you intend. As you move forward, keep in mind that this is an ongoing process of refinement. Be patient, stay open to feedback, and continue fostering those crucial relationships that will support your work in the long run.