



TOWARDS A BETTER PLACE

A Conversation about Promising Practice in Place-Based Philanthropy

September 8-10, 2014 | Conference Report



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What is Place-Based Philanthropy?

“Funders who have an intimate tie to a particular place that you can find on a map, and are focusing their work in that place with the people who live there and the organizations and institutions that are highly invested in that place. A place-based funder uses a wide-angle, multi-faceted lens in work that is about community resilience and vitality. They may work on one problem or issue at a time, but do so with respect for local history and culture, a commitment to identifying and mobilizing local assets, and an interest in building local capacity to weather the next storm.”

JANIS FOSTER RICHARDSON
former Executive Director of
Grassroots Grantmakers and
resident engagement consultant

“Place-based grantmaking approaches recognize that places are where disparities are concentrated—they are precisely where the most marginalized are marginalized...Places are also platforms for engaging community leaders and the constituencies necessary for advancing a larger scale policy agenda...To advance successful policy requires, en masse, the participation, leadership and drive of the very communities most impacted along with systems and policymakers. Devoid of such leadership and involvement, policies, no matter how strong they are on paper, often fail. Places provide the space to deeply engage those most impacted to mobilize around much needed policy for all and for foundations to engage key players to structure both appropriate relationships between the foundation and these players, and among the players themselves.”

TAJ JAMES
*Powerful Places: Principles for
Effective Community-Driven Change*
Movement Strategy Center, What We're
Learning Paper No. 4, September 2013



WHY THIS CONFERENCE?

“Place-based” initiatives, which 20 years ago may have been called “comprehensive community initiatives,” bring much-needed resources to struggling communities. Yet they may have unforeseen and sometimes unplanned consequences for the communities selected as sites of place-based initiatives. These initiatives can create significant challenges for the community-based organizations and leaders who foundations rely upon for implementation, and they can shift the local ecosystem of power dynamics and organizational relationships in complex ways.

The resurgence of interest in place-based grantmaking initiatives has surfaced the need to strengthen funders’ understanding of best practices as well as the complex dynamics that such initiatives can create at the community level. In 2014, the Aspen Forum for Community Solutions and Neighborhood Funders Group initiated a collaborative effort to develop learning opportunities and programming for funders designed explicitly to improve the effectiveness of place-based grantmaking.

Working with a planning committee,¹ the Aspen Forum and NFG organized a two-day convening for funders on Place-Based Philanthropy on September 8-10, 2014 in Aspen, Colorado. Intended as a beginning discussion with a diverse national learning community of funders of all sizes, geographies and experience levels, the convening provided a space for funders from around the country to get grounded in the current discourse on place-based grantmaking, and to share best practices and lessons learned locally and nationally.

Over 100 funders and leaders from the field attended the Aspen/NFG convening to learn from one another about how

¹ See Acknowledgements for a full list of planning committee members.

“We’re in an increasingly complex environment. We’re talking about a political system that has failed communities... We have seen a deficit in our education system. With all the money that foundations have invested, we still don’t see the magnitude of change that we want to see in our education system... We have to get out of the notion that we can fund communities out of the challenges that they have. It’s going to have to be more of a connected effort – political, philanthropic and community. And in the context of community, there is a broad range of players that we have to work with... They’ve been resilient over the long-term, they’ll be there when we’re gone – how do we make them more effective while we’re there?”

REGINALD JONES
PRESIDENT & CEO
JACOBS CENTER FOR
NEIGHBORHOOD INNOVATION



to better engage with communities and to address the structural implications of social, political, and economic inequities at work in community change processes – particularly, in poor communities, underserved communities and communities of color. The dialogue was rich, with participants challenging themselves to be candid and go deeper in addressing tough questions around the complexities of place-based grantmaking and how funders’ behavior and choices play into both success and failure.

This report provides an overview of the discussions that took place at this conference, including:

- lessons shared by experienced place-based funders
- key challenges and tensions that arise in place-based grantmaking
- participants’ learnings and takeaways from the conference discussions
- ways to support grantmakers to improve the practice of place-based grantmaking

SETTING THE CONTEXT

Place-based grantmaking strategies seek to improve the lives of residents in neighborhoods experiencing entrenched, intergenerational poverty, racial discrimination and profiling, and disparities in education, income, criminal justice, health, housing and other areas. These are complex issues that require funders to understand in any given place how systems, policies and politics historically and currently structure the opportunities that exist or do not exist in these communities in the context of race and class.

Yet many funders pursuing place-based grantmaking do not consider race and class power dynamics in how they approach their work at the community level. This can lead funders to support what some called “pragmatic but disconnected” leadership in communities. When trying to change the systems that have kept people disempowered over time, a deep understanding of local history of race and class inequality is key to building powerful leadership and engaging people in communities. In this context, from the outset of the conference funders were encouraged to examine their own practices and staffing and how they contribute to the success or failure of place-based strategies.

The conference convened shortly after the start of the community uprising in Ferguson, Missouri in response to another killing of an unarmed young Black man that captured the world’s attention. The events in Ferguson were on the minds of some of the funders attending the conference, bringing certain issues funders struggle



“How is it that we can go from flashpoint to flashpoint, be so enraged, and not build building blocks from one to the next? In each case, in every place, whether it be in Sanford, or in Ferguson, or the Ninth Ward, or in South LA, we see the same thing – an utter, utter disconnection. And it is in those places where the conversation of this conference begins.”

GIHAN PERERA
EXECUTIVE DIRECTOR
FLORIDA NEW MAJORITY



with in “place” into sharp relief. Flashpoints like Ferguson illuminate a microcosm of complex issues, where race and class tensions reach a boiling point and urgently demand attention and change.

The opening session challenged participants with the questions: Why do these flashpoints keep happening? What can we as funders constructively do? How do we support work that doesn’t just “move the needle,” but transforms a community?

In plenaries and breakout sessions, funders from around the country discussed their experiences and challenges with place-based grantmaking. Participants listened to case studies from West Oakland to Minneapolis to the Deep South, discussed the differences between funding in urban and rural “places”, and heard the varied perspectives of national funders and local funders – all while sharing lessons learned and posing hard questions about what needs to change in order to make place-based grantmaking more effective. ■





Monday, September 8

4:00–4:45 pm

Welcome and Opening

4:45–6:00 pm

Moving from Community Involvement to Community Ownership

KEYNOTE **GIHAN PERERA**
Florida New Majority

RESPONDENT PANEL

REGINALD JONES

Jacobs Center for
Neighborhood Innovation

JAMES KEDDY

The California Endowment

GLADYS WASHINGTON

Mary Reynolds Babcock Foundation

MODERATOR **DENNIS QUIRIN**

Neighborhood Funders Group

Tuesday, September 9

8:30–9:45 am

FISHBOWL CONVERSATION Making it Real: Local, National, and Community Perspectives on What Happens When Investing in Place

STARTING DISCUSSANTS

RAYMOND COLEMENAR

The California Endowment

BEN HECHT

Living Cities

SUSAN LLOYD

Zilber Family Foundation

SCOT SPENCER

The Annie E. Casey Foundation

FACILITATOR **DENNIS QUIRIN**

Neighborhood Funders Group

10:00–11:15 am

BREAKOUT SESSIONS The West Oakland Initiative: Different Expectations for Change

YOLANDA ALINDOR

The San Francisco Foundation

CHARLES FIELDS

The California Endowment

RHONNEL SOTELLO

Rogers Family Foundation

Funder Collaboration in Place

TAWANNA BLACK

Northside Funders Group

SOLOMON GREENE

US Department of Housing and Urban
Development

NANCY MARTIN

Youth Transition Funders Group

Why Grant Dollars Aren't Enough: Why Community Engagement and Process Matter

RAYMOND COLEMENAR

The California Endowment

JOHN ESTERLE

The Whitman Institute

CHRISTINE REEVES

National Committee for
Responsive Philanthropy

STEVE SAVNER

The Center for Community Change

GLORIA WALTON

Strategic Concepts in Organizing
and Policy Education (SCOPE)

1:30–2:45 pm

FISHBOWL CONVERSATION Getting to Success Part 1: What Goes into Making Place-Based Efforts Successful

STARTING DISCUSSANTS

SHANÉ HARRIS

The Prudential Foundation

DIANA MORRIS

Open Society Foundations

STERLING SPEIRN

Stupski Foundation

FACILITATOR **SHERI BRADY**

Aspen Forum for
Community Solutions

3:00–4:15 pm

BREAKOUT SESSIONS As the South Goes – Lessons on Place-Based Grantmaking from the South

LATOSHA BROWN

TruthSpeaks Consulting

XOCHITL DELGADO

Winthrop Rockefeller Foundation

GLADYS WASHINGTON

Mary Reynolds Babcock Foundation

NATHANIEL CHIOKE WILLIAMS

Hill-Snowdon Foundation

Failing Forward

REGINALD JONES

Jacobs Center for
Neighborhood Innovation

JENNIFER JAMES

Jacobs Center Center for
Neighborhood Innovation/
Harder+Company
Community Research

The Evolution of Place-Based Work: Lessons Learned From Existing and Past Long Term Efforts

BEN HECHT

Living Cities

JAMES KEDDY

The California Endowment

CARMEN ROJAS

The Workers Lab

SCOT SPENCER

Annie E. Casey Foundation

Wednesday, September 10

8:30–10:15 am

LARGE GROUP CONVERSATION Getting to Success Part 2: What are the Elements of a Successful Place-Based Effort?

JAMIE ALLISON-HOPE

S.H. Cowell Foundation

DAVID BLEY

Bill and Melinda Gates Foundation

RENEE FAZZARI

General Service Foundation

FACILITATOR **HALEY GLOVER**

Lumina Foundation



“I have watched so many national foundations come in [to Colorado] for 2-3 years and leave. I understand that for large foundations, even a short-term investment in place can be a triumph, but if we had set a timeline and left after a few years, we may have thought we failed. Funding effectively in place is complicated. If you don’t give yourself time to experiment, learn and evolve, you won’t make a lasting difference. It’s about longevity, not exit strategy.”

RENEE FAZZARI
PROGRAM OFFICER
GENERAL SERVICE
FOUNDATION



For more than 20 years, a **practitioner discourse and body of literature** has emerged about place-based philanthropy and its evolution. There is a wealth of knowledge and guidance in the literature, much of which has been captured in the Aspen Institute publication *Voices from the Field III: Lessons and Challenges from Two Decades of Community Change Efforts*.¹ But with foundations constantly shifting grantmaking priorities and changing staff, many of these lessons may not be widely known in the field.

Many models of place-based grantmaking have been short-term and defined narrowly by a foundation, with a high level of foundation control and imposed metrics of success. Some foundations that have been engaged in this work for decades have learned hard lessons and have shifted away from these overstructured models. At the same time, due to current trends in the field such as “strategic philanthropy,” “impact philanthropy” and a focus on “return on investment,” we continue to see foundations bringing initiatives to “places” in ways that replicate ineffective strategies or mistakes of the past.

The **Towards a Better Place** convening provided an interactive opportunity for both experienced and newer funders to learn and share the lessons of place-based grantmaking. Participants from national, regional and local foundations engaged in in-depth discussions about the challenges and lessons learned from the experiences of their own foundations. Some of the key challenges in place-based grantmaking are summarized here.

TIME-LIMITED INITIATIVES AND EMPHASIS ON SHORT-TERM RESULTS. Much of place-based grantmaking has been conducted in the form of initiatives, with the investment ending within a set timeframe (such as three years or five years). In these types of initiatives the funder often expects to see certain results or predetermined outcomes at the end of the initiative timeframe. Conference speakers identified the time-limited nature of many place-based grantmaking models as problematic for a number of reasons. For example, it takes a long time to simply get initiatives underway. They require a great deal of up-front time to build relationships – both between the foundation and the local players and among the funded organizations. It takes time to get all stakeholders on the same page about the goals and approaches of the initiative. Often it takes 3-5 years just to build upon existing community and leadership capacity to participate in the initiative, or to get momentum in moving forward the initiative’s strategies.

Conference participants shared many examples of how it takes longer to see results, and if foundations leave on their own schedule they miss those results. ▶

1 Anne C. Kubisch, Patricia Auspos, Prudence Brown and Tom Dewar, *Voices from the Field III: Lessons and Challenges from Two Decades of Community Change Efforts*. Washington, DC: The Aspen Institute Roundtable on Community Change, 2012.



“We’ve got to look at ourselves differently. Who we hire – that’s only part of the equation... We have to be co-learners with people in communities. To go in very humble - that’s hard for some of us to do, isn’t it? Because we don’t know everything... We have to listen differently and learn in a way that we’re not necessarily taught to learn in the prestigious universities that we go to.”

GLADYS WASHINGTON
PROGRAM DIRECTOR
MARY REYNOLDS BABCOCK
FOUNDATION



“What if we choose the wrong community anchor? They might be engaging with residents/community through delivering services, but they might not be organizing or driving social change.”

SUSAN LLOYD
EXECUTIVE DIRECTOR
ZILBER FAMILY
FOUNDATION



HOW WE DEAL WITH ISSUES OF POWER, RACE AND TRUST MAKE OR BREAK FUNDER-GRANTEE RELATIONSHIPS. As we discussed the challenges of place-based grantmaking, throughout the conference a major theme emerged that working with communities in place requires a level of trust that is often missing in the way foundations operate. Foundation staff often do not recognize or do not know how to address the race, class and power dynamics that exist in communities.

When working in marginalized neighborhoods, the intractable issues foundations seek to change are rooted in race and class inequities that are systemic and intergenerational. Effectively making change in a place is about challenging and undoing those deep-rooted inequities. In this context, foundations cannot be neutral about spoken or unspoken racism and other biases in the local power structure that impact the community. Without demonstrating its commitment and understanding of this context through staff on the ground who are capable of building trust, the foundation is unlikely to be effective, and may even unintentionally reinforce race and class inequities.

UNDERSTANDING THE LOCAL SOCIAL CHANGE ECOSYSTEM. Funders often decide to fund in a place without deep knowledge or analysis of community history, local players or how issues are interconnected in that place. Such limited understanding, coupled with the existing power differences between better-resourced and less-resourced organizations, and compounded by foundations’ biases towards organizations that are highly professionalized, may lead foundations to support what one speaker called “pragmatic but disconnected” leadership when investing in a place.

Understanding the organizational landscape and how the pieces fit together in a place requires a theory of change informed by historical social movements. Without that kind of approach, initiatives can often fail, waste resources, or heighten inter-organizational conflict by anointing organizations that are not capable of organizing communities and allies to move a broader social change agenda.

PLACE-BASED FUNDING BOUNDARIES MAY BE STATIC, BUT COMMUNITIES AND OPPORTUNITIES ARE NOT. Participants discussed a number of challenges that are inherent to local place-based grantmaking with defined geographic boundaries. In low-income communities, families often have to move to survive as their circumstances change, or may choose to move for better opportunities, making it hard to track impacts of funder investments on individual or household outcomes. In one funder’s experience, 60% of the people in a place will leave that place within three years. Also, in many places, the majority racial or ethnic population changes and the organizations and leaders the foundation has invested in may not be connected to newer residents. Circumscribed funding boundaries can also be seen as unfair or discriminatory, leaving out residents in nearby areas or in less spatially segregated areas who are experiencing similar barriers.





“They [foundation staff] are hired as experts but these multi-faceted, complex problems actually require much more than that. We’re asking them not to be focused on their past expertise but on a change process responsive to local conditions.”

BEN HECHT
PRESIDENT AND CEO
LIVING CITIES



In addition, place-based initiatives that “treat the place as an island” are not effective because neighborhoods are part of larger systems. Place-based strategies must be based on a broader power analysis that identifies barriers and opportunities beyond the place. This is a particularly important point for funders working on policy and systems change, which by its nature requires work beyond the level of a place. Because systems are larger than one place or even one region, creating long-term and sustainable systems change requires multi-level approaches. For example, in education, state policy drives much of what happens in local schools. Funders working in multiple sites can connect the work of the sites so that grantees work together on state or regional systems change.

A complication with applying a multi-level lens is that many communities may be threatened by the idea of working at the regional or state levels, as their historical power base may be local. Working regionally is very challenging for smaller community groups as it requires power building with new allies and addressing broader systems change in the region.

DON'T CONFUSE GENTRIFICATION WITH SUCCESS. Neighborhoods where place-based investments happen may become attractive to higher-income people, whether due to the results of the place-based investments, successful community organizing that brings new resources into the neighborhood, or simply due to market forces. Funders need to be aware of these forces and be clear about who the intended beneficiaries of their place-based investments are. Otherwise, seeing improved indicators like increasing income levels may be misinterpreted as success of the initiative, when in fact the intended beneficiaries are getting pushed out by higher-income people as a neighborhood improves and property values rise. Funders involved in place-based initiatives have to be committed to the people in the place, and help them prevent or counter displacement when needed. Strategies offered for fighting displacement include building the organizing capacity of established residents, engaging with governments on economic development policies, and making Program-Related Investments (PRIs) in adjacent neighborhoods.

COMMUNITY SOLUTIONS VS. TECHNICAL EXPERTISE. A key tension or debate that surfaced was the degree to which, and how, funders should bring in expertise and solutions when funding in a place.

We heard a number of examples of funders following the lead of the community designing their own solutions or campaigns, where the funders saw their role as listening, resourcing, convening and building capacity. Some national funders provided a contrast to this approach, arguing that under-resourced communities can benefit from technical expertise that they may not otherwise have access to, or that foundations can leverage their expertise to advance community





Challenges in Place-Based Grantmaking

agendas at the state or national levels. Some argued that communities may not always know the solutions, and that foundations are expected to add value.

The debate brought up important questions about how to balance content and process when working in places. For example, who should be the carrier of a technical solution to a community? One long-time national place-based funder shared that his organization has evolved to better address this tension by training staff and grantees in adaptive leadership.

Building trusting relationships and community buy-in was seen as the key to success regardless of the approach to community change. ■

“Gates believes in technical solutions to the world’s problems. But if you don’t know how to apply it in a context, it is not a solution. Content experts are important, but you have to know how to apply a solution in a place.”

DAVID BLEY
DIRECTOR
PACIFIC NORTHWEST
INITIATIVE
BILL AND MELINDA
GATES FOUNDATION





Lessons and Advice for Funders

In the last decade, foundations have begun experimenting with new approaches to place-based grantmaking. Many foundations engaged in place-based work are now evolving towards models that are more community-driven¹ and flexible, drawing upon lessons from the community organizing field and taking a longer-term approach that views the “place” as an ecosystem with multiple actors playing and complementary roles.

Representatives of foundations who have decades of experience with place-based grantmaking shared successes, failures, pitfalls and advice. These lessons resonated in rich discussions throughout the conference. Larger themes and takeaways are summarized here.

MAKE THE SHIFT FROM BEING A GRANTMAKER TO A CHANGEMAKER AND CO-LEARNER. Foundations often look for academic or policy expertise and bureaucratic skills when hiring program officers, but a different skill set is needed for doing place-based grantmaking. Taking into account the race, class, values and cultural competency of the staff representing the foundation at the community level is important. Equally important is the capacity for humility. Changemakers are people who can inspire a trusting relationship despite the power imbalance inherent in the grantee-funder relationship. To be a changemaker, program officers must be co-learners with those doing work on the ground rather than coming with the answers. They should be trusted outsiders who can bring the knowledge from the community back to the foundation.

As changemakers, program officers also have to be intimately familiar with the politics at the neighborhood, city and county level. In some places there is a hospitable political environment, and in some places it is adversarial. Changemakers must have the savvy and communication skills to know how to navigate politics at any given moment and inform the partnerships that develop. Funders are beginning to address the need for these kinds of skills through professional development, for example through staff training in adaptive leadership and nonviolent communication. ▶

¹ We use the term “community-driven” while acknowledging that there is a continuum of levels of community engagement in place-based grantmaking. Some foundations may engage with communities in place by asking residents to participate or provide input into strategies defined by the foundation. Place-based efforts that are more community-driven or community-owned may give residents a greater or primary role in designing initiative components, making decisions, leading the work, and defining what success looks like. For more insight into different approaches to community partnership in place-based grantmaking, see Movement Strategy Center’s paper [Powerful Places: Principles for Effective Community-Driven Change](#) and notes from the [Community Democracy Workshop](#).

“There needs to be a call to action in this field around relationships and trust. The role of the grantmaker is to build relationships, have humility and listen... being a student all the time. Coming with a learning posture helps build relationships. In communities that don't look like you, you have to go in with a learning posture.”



JAMIE ALLISON-HOPE
SENIOR PROGRAM OFFICER
S.H. COWELL FOUNDATION

“Prior to investing in a place, we have found it essential to spend time listening and developing a framework for authentic community engagement to occur. That usually means investing in consultants to work through the issues of disenfranchisement, structural racism, and access, prior to making decisions on how best to help rural communities achieve positive outcomes. Early on, money is very rarely the answer.”



ANDREA DOBSON
WINTHROP ROCKEFELLER
FOUNDATION



RESOURCE COMMUNITY ENGAGEMENT AND COLLABORATION.

For place-based work to be successful and benefit the people living in the place, change needs to be resident-driven. It is not enough to just provide project grants. The foundation must also deploy resources to ensure that residents are involved in the process. The early stage of place-based work is very important – involving relationship-building and being very clear and up-front about the change the foundation is trying to achieve. It can take a year or longer to get all the stakeholders on the same page, or a couple years of community engagement to get started.

Effective community engagement and collaboration may also call on foundations to bring to bear resources beyond money. For example, when working in rural places or other places that lack political voice or organizational infrastructure, funders must spend time on the ground in communities, and provide resources in ways that they can use. Community engagement is critical so that funders can listen and adapt strategies based on what is learned from the field.

Collaboration among grantees and with other stakeholders is usually critical to success in place-based efforts, and must also be resourced by funding process, meeting time, coordination and facilitation. One approach to collaboration that is useful in place-based grantmaking is the concept of “collective impact,” which offers many examples of communities and organizations coming together across sectors to solve complex problems in place. Collective impact stresses the need for a common agenda, shared measurement, continuous communication, reinforcing activities and a strong backbone of coordination. These principles speak to important aspects of successful collaboration, which is critical to success in place-based efforts.

LEVERAGE THE FOUNDATION’S NAME AND STATUS TO INCREASE VISIBILITY AND ACCESS OF PARTNERS ON THE GROUND.

Funders can support community agendas not only by deploying their financial resources but also their political standing and prestige as respected institutions. Foundations engaged in place-based work can do much more – for example developing relationships, positioning community partners in a way that is influential and engaging in policy advocacy. Related to this is the tremendous convenor role that foundations can play, using their clout to bring leaders from different sectors, such as government, business and academia, to the table in support of support community-driven agendas.

Participants also gave examples of how foundations can structure and direct funding relationships in ways that shift power dynamics in favor of community organizations. One example shared was from Louisiana, in which a national funder decided to grant research funds to a community organization rather than directly to a research institution, making the researchers hired more accountable to the community. In another

“One of the best things we can do as funders, given our role in communities, is to help position our partners to have influence in decision making processes. Sometimes that is something we shy away from, but it is one of the most important things we can do. It requires us to be clear about what goals we want to achieve in that community, and the values we have around community participation and engagement.”



RAY COLMENAR
SENIOR PROGRAM
MANAGER
THE CALIFORNIA
ENDOWMENT

“We think of grantmaking as one tool of many that we have to use. What that means is that we practice a hands-on philanthropy and are encouraged by our board—both locally and nationally—to be advocates in our own voice. In doing that, though, we have to think when it’s appropriate because we are trying to build capacity and don’t want to take a seat at the table that should belong to someone else or overlook someone whom we should make room for in the conversation.”



DIANA MORRIS
DIRECTOR
OPEN PLACES INITIATIVE
AND OPEN SOCIETY
INSTITUTE – BALTIMORE,
OPEN SOCIETY
FOUNDATIONS



Lessons and Advice for Funders

example from California, a funder was approached by a city government to develop an explicit health element in its general plan. The foundation directed funds to an intermediary who would bring community partners to the table and develop the health element of the general plan, rather than funding the city consultant who originally proposed the idea.

MAKE A LONG-TERM COMMITMENT. Funders with long experience in place-based grantmaking described how their foundations had generally moved away from short-term initiatives, from many angles. Consistent funding allows foundations to experiment and try new things. Staying a long time allows you to gain greater perspective on the place, learn what the community wants, and avoid making incorrect assumptions. And long-term commitment makes deep collaboration possible.²

Long-term commitment also translates into providing general operating support to key grantees that are doing the heavy lifting of place-based work. Participants acknowledged that philanthropy has a long way to go when it comes to shifting from project grantmaking to general operating support. To build support for longer-term commitments to places and organizations, it is important to engage foundation staff and board in learning what the social change process looks like and that change is not immediate - it happens in different phases and on a continuum. For example, winning a policy change may seem like a measurable outcome but it is in the implementation of policy wins that victory becomes real for people. Also, politics change and successes in a place can be undone. Only by staying long-term in a place can you help solidify successes.

CO-INVEST IN GOOD WORK THAT IS ALREADY HAPPENING OR EMERGING FROM COMMUNITY PARTNERS. Don't force collaborations. Rather than coming with the issues, figure out with the community what would make a big impact and build on what is ripe there. Funders describe shifting from large place-based initiatives to a different style of working in place – co-investing. Rather than branding and running a big initiative, foundations can make an impact by joining efforts on the ground as a partner - even with a modest investment.

COORDINATE MULTIPLE FUNDERS WORKING IN THE SAME PLACE. When national funders come into a place, their activities may add layers to existing place-based efforts. For community organizations, having to implement multiple strategies for different funders results in "initiative fatigue." When national funders come on the scene, it is particularly important to create opportunities for them to meet, coordinate and align their efforts with those of other funders. Local funders with deep

“We show up not with initiatives, but with adaptives. We ask: who has already set the table that we can modestly join?”



STERLING SPEIRN
SPEAKING AS FORMER
PRESIDENT AND CEO
OF THE W.K. KELLOGG
FOUNDATION

“Now we would not call it an initiative. We came into Making Connections with a theory of change and narrowed down sites. Now we seek opportunities for strategic co-investment that starts at a small scale. Context matters – the theory of change in Making Connections was very set. Now in the Family-Centered Community Change sites, the Foundation is a co-investor and a partner as opposed to the lead.”



SCOT SPENCER
ASSOCIATE DIRECTOR
FOR ADVOCACY AND
INFLUENCE
ANNIE E. CASEY
FOUNDATION

² Examples of long-term funder commitments in places are discussed in-depth in the conference video [Getting to Success Part 2](https://www.youtube.com/playlist?list=PL7fuyfNu8jfnEqbDw1wLm8L938cuXrHRJ). Link: <https://www.youtube.com/playlist?list=PL7fuyfNu8jfnEqbDw1wLm8L938cuXrHRJ>



roots in a place are well-positioned to play a coordinating role but may need resources to do so. Funder alignment and coordination can significantly ease burdens on community groups, for example by developing common learning metrics. Coordinating funder efforts also creates the potential to multiply the impacts of their investments in the same place.

LEARN AS YOU GO AND BE OPEN TO DIFFERENT PATHWAYS TO SUCCESS. Speakers urged funders not to be overly focused on pre-defined metrics, which show you only one pathway. Often in place-based work, the outcomes that have been most successful were unplanned and unforeseen. They arose from long-term relationship building and the development of new leadership that didn't exist in the beginning. Sometimes, opportunities come because you're open to them, and able to let go of what you initially thought was the pathway.

Funders who have been engaged in long-term place-based work have shifted their evaluation approach as well, to one that is developmental and interactive and allows for learning in real time. They shared how they use information about successful practices to change the foundation's approach in the moment, as opposed to waiting for evaluation results. Some funders have moved away from administering written evaluation reports, and instead convene grantees and learn from them face-to-face. For some, the learning community that has been established through regular convenings of community partners across sites, though expensive, has been one of the most valuable outcomes of their place-based work. ■

“Funders often come very invested in a particular outcome, and when it's not happening, we get very frustrated, disinterested. If you say you're investing in a process but you're really just investing in a particular outcome, it leads to disappointment.”



SOLOMON GREENE
SPEAKING AS
SENIOR ADVISOR
U.S. DEPARTMENT OF
HOUSING AND URBAN
DEVELOPMENT

“Sometimes accidental outcomes matter.”



JIM KEDDY
CHIEF LEARNING OFFICER
THE CALIFORNIA
ENDOWMENT





Throughout the conference, funders appreciated the opportunity to hear about one another's experiences and lessons learned in place-based grantmaking. While these were important initial conversations, many wanted more guidance on **how** to put these lessons into practice in order to improve the craft of place-based grantmaking. They identified several areas for training and support, including:

- applying race and class lenses to place-based grantmaking
- exploring how to move from being a grantmaker to a changemaker and co-learner
- shifting the organizational culture of foundations towards longer-term commitments and general operating support
- choosing partners on the ground – both community partners and other funders
- understanding organizational development and community capacity building in a place
- learning through more case studies rich in context
- developing appropriate measurement practices for judging important aspects of place-based work such as trust building and relationship building
- creating effective learning networks
- exploring the distinctions between place-based and local grantmaking
- sharing ways for philanthropy to work with local governments in place-based efforts

The **Towards a Better Place** convening was the beginning of an ongoing collaboration between Aspen Forum for Community Solutions and Neighborhood Funders Group to introduce a broad and diverse cross-section of grantmakers to new and emerging ideas, trends and strategies in place-based grantmaking. By way of next steps, we are considering organizing more in-depth conversations and ongoing sharing of tools and solutions to help funders at all levels reexamine the dynamics of their relationships with the communities where they are investing. We look forward to continuing this partnership to establish a robust learning community of place-based grantmakers. ■





Resources for Place-Based Grantmakers

Watch [videos](#) of the **Towards a Better Place** plenary sessions

Check out our [resource guide](#) to place-based grantmaking.

Join a learning community:



NFG's Working Group on Place Based Community Change is dedicated to finding achievable solutions for building robust communities of opportunity that create prosperity for everyone. Working group membership includes funders at city, state, regional, and national levels who are committed to authentic partnership, lasting resident-led community change, and to learning from the work of their funder peers. To get involved, contact us at nfg@nfg.org.



The mission of the **The Aspen Forum for Community Solutions** (AFCS) is to support community collaboration – including collective impact – that enables communities to effectively address their most pressing challenges. As part of this work, in partnership with FSG, AFCS co-hosts **the Collective Impact Forum**, an online community for those practicing collective impact to find the tools, resources, and advice they need. It's a network of individuals coming together to share experience and knowledge to accelerate the effectiveness and adoption of collective impact. Please visit www.collectiveimpactforum.org.

