**Community Leadership Network Evaluation**
**Key Findings from a Survey of Participants**

By Marisa Bueno, MA
Stanford University
Prepared for CFLeads
March 2010

# Table of Contents

# EXECUTIVE SUMMARY

This evaluation report presents the major findings of an evaluation survey on the effectiveness of two inaugural Community Leadership Networks (CLNs) that brought together community foundations with the overarching goal: "To create results-oriented networks that will build individual community foundation capacity and the field's knowledge base on community leadership."

The CLN was developed by CFLeads in partnership with the Community Foundation Leadership Team (CFLT) of the Council on Foundations (COF) and Aspen Institute Community Strategies Group (CSG) to help community foundations put into practice the "Framework for Community Leadership By A Community Foundation." The framework was created by the National Task Force on Community Leadership (NTF) in 2008 to define community leadership and its building blocks. The NTF was empanelled by CFLeads and endorsed by the CFLT in 2007 to respond to the need for a framework that would be used by the community foundation field in building the capacity of those community foundations that wanted to become more effective community leaders.

The pilot CLNs were intended to be a replicable model that could help a critical mass of community foundations practice effective community leadership and move the field toward the larger goal of making effective community leadership a defining core competency of community foundations. The Superior pilot group was regional, involving 11 community foundations from Minnesota and Wisconsin and co-hosted by the regional associations of grantmakers serving those states and ran from April 2008 to February 2009. The Alpha CLN consisted of six community foundations drawn from across the country and ran from July 2008 to May 2009. Each community foundation was represented in the CLNs by teams of up to six staff and board members that participated in three, two-day peer-learning institutes.

The format of the institutes included presentations by community foundations from inside and outside the CLN, presentations by outside content specialists, introductory community leadership stories by each community foundation, structured peer advising, informal time for networking, team action planning, and updates from community foundation teams on action plan progress. Each team identified at least one internal or external community leadership challenge (a "Learning for Action Question") that it wanted to pursue and receive peer support on during the course of the CLN. The institutes were customized, with content based on the community leadership interests and challenges identified by members of each CLN through pre-session interviews conducted by the CFLeads-Aspen planning team.

**Sample description:**
There were 74 attendees from 17 community foundations and three regional associations that participated in one of the two CLNs. We had a **100% response rate** with 17 of the 17 CLN organizations providing two or more respondents each. The focus of the survey was on the opinions and progress of the community foundations attending the CLNs. For 16 out of the 17 organizations, one of the respondents was a CEO.

**Satisfaction with the CLN Process**

**The survey data show that the CLN was successful both in offering a valuable experience that cannot otherwise be found in the community foundation field and in building the capacity of its participants to take on community leadership.**

- *Ninety-four percent of respondents agree or strongly agree that "CLNs…would be a worthwhile, on-going investment for the community foundation field." Note that of that 94%, 61% "strongly agree" with the statement.*

- *Ninety-two percent of survey respondents agree or strongly agree that "the CLNs, as they are currently designed, are an effective strategy for helping community foundations at different points in their community leadership development [to] build capacity to practice effective community leadership."*

- *Eighty-nine percent of respondents would choose to take part in the CLN again.* Respondents noted several reasons why their participation in the CLN was valuable and why they would choose to take part again. These can be grouped into three common themes:
  1. Board participation was very valuable for building internal accountability, shared understanding, and common commitment to community leadership.
  2. The peer learning element was unique (does not exist elsewhere in the field) in its structure, intensity and value.
  3. There were a lot of practical benefits - new tools, concrete techniques, exposure to best practices and a framework for understanding community leadership and time to work on real world projects - that will strengthen and advance CL work.

  While the survey demonstrated overwhelming support for the process, there were a few people with concerns about the process. Two participants did not feel that the time commitment for senior staff and board members was worth the benefits reaped from the CLN process, particularly for organizations that were more advanced in their community leadership work. Concerns related to the feasibility of broad replication of the CLN were also expressed by three of the participants. In addition, there was a concern that the Alpha CLN was too diverse in terms of size, region and community leadership experience to develop a cohesive, on-going learning community. Finally, one participant was expecting the CLN to bring community foundation leaders together by region to learn how to collaboratively address specific issues and so, was disappointed.

**Impact of the CLN Process**

**CLN members reported broad, deep and identifiable changes in community leadership capacity. The majority of survey respondents reported changes to staffing, finances, programming and/or policies and processes in their organizations that fall in line with the goals of the CLN and reflect the community leadership framework.**

- *Ninety-one percent of respondents said that <u>the CLN facilitated progress</u> in a broad and deep number of areas and cited a number of accomplishments that resulted (partially or directly) from CLN participation. All of these are changes that have potential to deeply impact the work of the foundations.*

    Overall, the respondents felt that they had made "some" or "significant progress" on a wide variety of community leadership benchmarks (associated with the community leadership framework). The types of changes reported indicate that the CLNs supported foundational changes in the majority of participating organizations and that there are areas where more focus could be considered.

    Of the building blocks where some or significant progress was made, the *most significant* progress was reportedly made, with over one quarter to one third of respondents reporting significant progress, on the following:
    - Addressing equity, diversity and inclusion issues (37%);
    - Board engagement (32%)
    - Incorporating community leadership into strategic plans (31%)
    - Incorporating community leadership into work plans (29%)
    - Board composition (27%)

    When their responses were analyzed separately, CEOs also indicated that *significant progress* was commonly made on choosing and timing leadership issues (44%) and making community leadership part of their organizational mission statement (47%).

    Finally, participants indicate that they made the *least progress* on:
    - Developing messages that work (23%)
    - Engaging donors and other co-investors (23%)
    - Measuring the impact of community leadership work (17%)
    - Board engagement (15%)
    - Developing a business model that supports community leadership (15%)

    These are areas where further focus may be necessary during the CLN and/or during follow-up and network maintenance.

- *Ninety percent of board members report that they are engaging more deeply in community leadership work as a result of the CLN.*

    Specifically, they reported that "as a result of participating in this CLN" they have lead formal board discussions about community leadership, represented the foundation in public settings on community leadership matters, participated in strategic planning related to community leadership initiatives and addressed governance issues. Only one reported that he had not engaged in community leadership activities.

- *Eighty-one percent of the respondents perceived growth in their organization's community leadership capacity from before the CLN to after the CLN. The majority of respondents felt that the CLN contributed to shifts in organizational community leadership capacity.*

  Organizations that considered themselves less experienced with community leadership at the start of the CLN, felt that their organization's community leadership capacity had grown more over the course of the CLN. Those that started with more perceived capacity reported smaller changes. This finding indicates that significant changes in capacity get more difficult as the organization gets closer to the ideal definition of "community leader." This is not a surprising finding but may help guide the field in thinking about where the CLNs will have the most bang-for-the-buck from a capacity building standpoint.

- *When asked how they would describe what they learned, more than half of survey respondents volunteered that the CLN provided participants with a deeper and more nuanced understanding of:*
    - Elements of community leadership
    - The depth and breadth of leadership work being done
    - The importance and benefits of community leadership
    And/or
    - The difficulties and limits of leadership roles

  Representative quote: "I learned about why Community Foundations are so uniquely positioned to serve as catalytic leaders in the community. I learned about the essential elements a [community foundation] needs to be an effective leader and was exposed to cutting edge tools to help make it happen. I met a number of incredible innovative, passionate, dedicated, and fun individuals."

**CLN members are investing in their community leadership capacity at a higher rate (85% versus 65%) than the baseline for the community foundation field.**

About 85% of survey respondents indicated that they had made changes, or planned to make changes in the coming year, in resource allocation (staff time and/or finances) to increase their organization's community leadership capacity. In comparison, according to the baseline 2007 community foundation national survey results, approximately 53% of respondents had made changes to staff or finances and an additional 12% planned to make changes for a total of 65% of community foundations nationally that were investing in community leadership.[1]

---

[1] "Feedback from the Field 2006 & 2007 Survey Results on Community Leadership" prepared for CFLeads by FSG Social Impact Advisors, March 5, 2008. An additional survey was conducted in 2009 but the data were not available at the time of the writing of this report. It should be noted that when FSG's national survey was administered in 2007, the National Task Force (NTF) on Community Leadership had not completed their work on the Community Leadership Framework for Community Foundations. The Framework defined community leadership for the field and this definition was used extensively in the CLNs. When the FSG survey was administered in 2007 the definitions of community leadership that the 211 respondents to the national survey were working from were their own individual definitions of community leadership. It is possible that the definitions they were

Organizations that made clear that their resource changes devoted to community leadership pre-dated the CLN, also noted that the CLN had encouraged progress in their community leadership work.

**Key Attributes of the CLN Process**

**The elements of the CLN design that make it unique to the field are the elements that appeared to be the most valuable pieces of the process. These include: face-to-face peer learning, involvement of board <u>and</u> staff, great facilitation, a long-term commitment, a multi-meeting format, and a focus on applied learning. The data suggest that these elements, which were called out as individually strong, are strongest when used in combination with one another.**

- *The face-to-face peer-learning element is unique in its year-long, multi-meeting structure and intensity (does not exist elsewhere in the field) and was cited by every participant, at some point in the survey, as the part of the CLN with the greatest impact.*

- *Ninety-two percent agreed or strongly agreed that face-to-face time with peers provided by the CLN is essential for building trust and strengthens the potential for future communication and cooperation amongst community foundations.*

The process helped to build new and strengthen old relationships in ways that provided both practical benefits and personal rewards. In some cases, relationships formed and strengthened have already contributed to on-going learning and collaboration. Peer-to-peer interaction in several forms (presentations, small groups, and one-on-one time) was beneficial because it allowed participants to network, learn from peer examples, receive feedback and guidance, share ideas and information, build relationships, and explore collaborations. The peer-to-peer environment also facilitated a sense of accountability that pushed most community foundations to make progress on the issues they brought to the table. In addition, the peer learning environment encouraged bonding between board and staff within teams.

Representative comments:
"This type of peer learning is great and fluid in that as the participants change, insights and opportunities also change. Great learning and engagement model for those trying to implement leadership efforts in their communities."

---

using were more or less rigorous than the one presented in the framework. Regardless, the CLN members were working from the common, comprehensive definition developed by the NTF whereas the rest of the field was not. This fact makes the comparison of the 2007 data and the comparison of the present CLN data less precise. However, the data offers interesting insight into the priority that the CLN members place on investing in community leadership, as compared to the priority placed on community leadership investment by the community foundation field more generally in 2007.

"I believe that meeting three times was very valuable. We were accountable to the group as a whole to do our work and the results of each meeting expedited all of our work by possibly years."

"A strength was the process by which elements of the leadership model could be learned, tried out and reported on, as well as receiving feedback from peers."

- *Eighty-nine percent of participants agreed or strongly agreed that board participation in the CLN process was essential to the CLN having a lasting impact on their organization (66% strongly agreed) and should be maintained in future CLNs.*

  Board participation was very valuable for building internal accountability, shared understanding, and common commitment to community leadership. The opportunity to bring board and staff together in a "neutral" space and with the support of outside experts allowed for dialogue about values and strategies that contributed to team building, alignment and often, greater board engagement.

- *Facilitation by Aspen Institute was also considered to be an essential part of the CLN's effectiveness by the majority (88%) of participants. Two respondents said they would not keep Aspen as facilitator and two said they would alter the facilitation in some way.*

- *In response to an open-ended question regarding strengths of the CLN process, the majority of respondents noted that the structure of the CLN allowed for the introduction of and experimentation with new tools, models, best practices and techniques that participants found extremely valuable.*

- *As leadership capacity develops, the barriers to and issues with community leadership that community foundations face appear to shift. Future CLNs may want to address those shifts in different ways.*

  While some barriers to community leadership that existed before the CLN were addressed by the CLN sessions, old, unsolved issues remain (such as having appropriate staff and dollars to devote to community leadership) and new issues with community leadership practice came into focus for the organizations (such as how to prioritize issues of most importance once an organization becomes recognized in the community as a leader).

### Summary and Implications
**There were several interdependent elements that were essential to the CLNs success in building individual and organizational capacity to practice community leadership**
- The peer network approach provided community leadership practitioners with the opportunity to create and strengthen peer relationships that facilitate information sharing, collaboration, and learning.

- The CLN long-term, peer learning process built the understanding of participants and the will to practice community leadership.
- The applied learning component is important because it gave participants the opportunity to institutionalize new understandings in their organizational goals, strategies, routines, processes and structures.

**There are several ways to strengthen these elements**

**Peer network approach**

- *Provide longer-term follow-up* (*network support and evaluation*)
- *Organize regional and issue- based cohorts*
- *Provide incentives for more experienced participants to mentor*
- *Involve regional grantmaker association leaders*
- *Maximize efficiency of getting- to-know-each-other activities*
- *Include more one-on-one time with experts presenting tools and strategies*

**Foundations of community capacity – understanding and will**

- *Structure peer advising and other sessions to reflect the traits and needs of the full spectrum of participants*
- *Format sessions so that they are more digestible*
- *Use the internet to facilitate sharing and provide on-going support*
- *Look at formats that can maximize reach over time*

**Applied skill building**

- *Focus on metrics*
- *Provide more time with tool presenters*
- *Consider some additional areas of applied focus*
- *Expand curriculum to include evolving challenges of community leadership as well as continuing to adapt sessions to address community foundations with different levels of community leadership experience.*

**INTRODUCTION TO THE COMMUNITY LEADERSHIP NETWORKS**

This evaluation report presents the major findings of an evaluation survey on the effectiveness of two inaugural Community Leadership Networks (CLNs) that brought together community foundations with the overarching goal: "To create results-oriented networks that will build individual community foundation capacity and the field's knowledge base on community leadership."

The CLN was developed by CFLeads in partnership with the Community Foundation Leadership Team (CFLT) of the Council On Foundations (COF) to help community foundations put into practice the "Framework for Community Leadership By A Community Foundation." The framework was created by the National Task Force on Community Leadership (NTF) in 2008 to define community leadership and its building blocks. The NTF was empanelled by CFLeads and endorsed by the CFLT in 2007 to respond to the need for a framework that would be used by the community foundation field in building the capacity of those community foundations that wanted to become more effective community leaders.

The pilot CLNs were intended to be a replicable model that could help a critical mass of community foundations practice effective community leadership and move the field toward the larger goal of making effective community leadership a defining core competency of community foundations.

More specifically, the goals of the CLN sessions as presented in the meeting agendas and program materials, were to help participating community foundations to:

- Build knowledge, abilities and connections within their Networks and in their organizations to advance their community leadership readiness, role, proficiency and efforts.
- Increase understanding about what *"community leadership"* means for individual community foundations – and in the community foundation field and explore experience, expertise and impact related to challenging community leadership building blocks.
- Increase awareness of and learning about what others in the field are doing, approaches they have used, issues they have addressed, and critical challenges they have faced.
- Develop a specific focus for each foundation's community leadership learning and action for the year and make progress on those action plans.
- Receive peer advice on pressing challenges in real time.
- Spend concentrated time exploring and learning how to use new tools or employ new methods relevant to pressing problems.
- Create peer connections that will contribute to a growing exchange and demand among participants to the *Network.*
- Develop the capacity to assess the effectiveness of their community leadership work.

The CLNs were sponsored by the CFLT of the COF. The development and implementation of the CLNs was staffed by CFLeads and the Aspen Institute CSG.

The two CLNs were formed, based on a national application process in 2008. One CLN – Superior – was regionally focused, involving 11 community foundations from Minnesota and Wisconsin and co-hosted by the regional associations of grantmakers serving those states. The Alpha CLN consisted of six community foundations drawn from across the country. Each community foundation was represented in the CLNs by teams of up to six staff and board members. The teams participated in three, two-day peer-learning institutes held in retreat settings over the course of ten months.

The CLNs engaged participants in intensive, cumulative, peer learning around the Framework for Community Leadership by a Community Foundation that was developed in 2007-2008 by the National Task Force to define and describe the building blocks of community leadership. The format of the institutes included presentations by community foundations from inside and outside the CLN, presentations by outside content specialists, introductory community leadership stories by each community foundation, structured peer advising, informal time for networking, team action planning, and updates from community foundation teams on action plan progress. Each team identified at least one internal or external community leadership challenge (a "Learning for Action Question") that it wanted to pursue and receive peer support on during the course of the CLN. The institutes were customized, with content based on the community leadership interests and challenges identified by members of each CLN through pre-session interviews conducted by the CFLeads-Aspen planning team.

Representatives from each community foundation attending the CLN responded to a retrospective survey in November and December of 2009. CFLeads undertook this independent retrospective evaluation of the CLN's to learn about the impact of the CLNs and to inform the development of future community foundation peer-learning activities. Three main questions addressed by the survey were:
- How would participants rate the quality and effectiveness of the community leadership network process?
- What did participant organizations gain from participating in the CLN?
- What were the most important elements of the CLN process?

As a result, the preceding Executive Summary and Survey Findings are divided into three primary sections summarizing the survey findings on:
1. Satisfaction with the CLN Process
2. Impact of the CLN Process
3. Key attributes of the CLN process

A link to an on-line survey was sent to the 74 individuals that attended one or more sessions of either the Alpha or Superior CLN. Understanding the pressures of day-to-day work, the letter that accompanied the survey asked that each community foundation ensure that at least two members of their CLN team respond to the survey.

# SURVEY SAMPLE AND METHODS

- There were 74 attendees from 17 community foundations and three regional associations. Seventy of the 74 CLN attendees were staff and board members from community foundations and four of the CLN attendees were staff members of regional associations.
- We had a **100% response rate** with 17 of the 17 CLN organizations providing two or more respondents each.[2] In total, 38 of the 70 community foundation attendees responded to the survey for a 56% overall response rate which is well above average for surveys of this type.
- The focus of the survey was on the opinions and progress of the community foundations attending the CLNs. However, the impressions of the regional association leaders provide an alternative perspective on the value of the CLN and the future development of these professional networks. Therefore, two regional association representatives were interviewed by phone to gain more in-depth perspective.

**The survey respondents were representative of the CLN attendees, making this a strong sample:**
The survey sample was representative of the overall pool of CLN attendees.

Sixteen respondents (42%) attended the Alpha CLN and 22 respondents (58%) attended the Superior CLN. In comparison 38.5% of total CLN participants attended the Alpha CLN and 61.5% attended the Superior CLN.

In addition, eleven respondents were board members (28%), which is similar to the overall pool where approximately 33% of CLN attendees were board members/trustees. About 27 of the respondents were community foundation staff members (70%), which is similar to the overall pool where approximately 67% of CLN attendees were community foundation staff members. Sixteen of the respondents were Presidents or Chief Executive Officers (41%). The CEOs and one additional staff and/or board member were asked to respond in order to gain a broad perspective of operations of the CLN organizations.

The survey data were collected from November 18th through December 26th, 2009 through an on-line survey. Qualitative analyses of open-ended questions were performed by openly coding the answers to see what themes recurred most frequently. Those themes are used to explain and contextualize the quantitative data in the survey.

---

[2] Not wanting to overly burden participants, the evaluator requested that two people from each of the community foundation teams respond to the survey.

**SURVEY FINDINGS**

The following report is divided into three sections.  The first section explores data related to the level of satisfaction participants felt with the CLN process.  The second details the impact the process had on the participants and their organizations in relation to the goals of the CLN.  The third section highlights the elements of the CLN that participants felt contributed most and least to the CLN's utility.  Following a brief summary, implications to consider in planning future CLNs are considered based on the data from the survey.

**Satisfaction with the CLN process**

**The survey data suggest that the CLN was successful both in offering a valuable experience that cannot otherwise be found in the community foundation field and in building the capacity of its participants to take on community leadership.  A small minority did not feel that the resources invested were worth what they gained from the process.**

> "I found the sessions to be very beneficial to our foundation and to me personally to strengthen my community leadership skills.  I would strongly recommend that each foundation participate in a CLN at some point."
>
> "Time away that is dedicated for peer learning is invaluable.  The careful planning and facilitation of each session - including topical experts being brought in to respond to group needs at 'just the right time' - not only required focus on the part of all participants and increased learning, but also illustrated that the organizers respected and valued my time.  Board participation was vital; provided a venue for peer organizational learning not previously available within the CF field."

The survey provides a variety of qualitative and quantitative evidence that shows that the vast majority of participants was highly satisfied with their experience and felt that the CLN was well worth the time and money invested.

- For instance, 92% of survey respondents agreed or strongly agreed that, "the CLNs, as they are currently designed, are an effective strategy for helping community foundations at different points in their community leadership development, build capacity to practice effective community leadership." Only 8% of respondents, 3 people, disagreed that the CLNs are effective as currently designed.  For this small minority, concerns were born out of the feeling that the CLN did not suit the needs of those who were advanced in their community leadership work as well as it suited those who were not as advanced.  In addition, a small number of respondents had concerns related to the expense of the CLN and feasibility of broad replication.

> "There is value in being a participant in a "learning community;" however time commitment for senior staff and board for meetings and meeting prep was increasingly onerous."

> "Because the member CF's in the Alpha CLN were very diverse in terms of size, region and CL experience the opportunity to develop a cohesive learning community was not part of our experience."

- Ninety-four percent of respondents agreed or strongly agreed that, "CLNs…would be a worthwhile, on-going investment for the community foundation field." Of that 94%, 61% "strongly agree" with the statement. Only 3% disagreed with the statement and the other 3% were neutral on the statement.

- Perhaps the most direct support of the idea that CLN participants were satisfied with their CLN experience is in the finding that the vast majority of respondents (89%) said that they would choose to take part in the CLN again. Respondents noted several reasons why their participation in the CLN was valuable and why they would choose to take part again. These can be grouped into three common themes that will be explored in greater depth throughout this report:

  - **Board participation** was very valuable for building internal accountability, shared understanding, and common commitment to community leadership.
  - **The extended peer-learning element** was unique (does not exist elsewhere in the field) in its structure, intensity and value. The process helped to build new and strengthen and renew old relationships that provided practical benefit and personal reward. In some cases, relationships formed and strengthened have already contributed to continued learning and sharing.
  - **There were a lot of practical benefits** - new tools, concrete techniques, exposure to best practices, a framework for understanding community leadership and time to work on real world projects - that will strengthen and advance their CL work. For some the understandings of community leadership and the potential of leadership roles for community foundations was new and made the experience every powerful. For others, their CLN experience justified and solidified the path their organization was on.

A small minority (11%) said that they would not take part in the CLN knowing what they now know. Interestingly, these four individuals expressed that there was value in the peer learning process and felt the goals of the CLN were solid but also felt that the time commitment for senior staff and board members was onerous and their organizations did not gain enough to make it worth that investment. Two people felt that the Alpha CLN was too diverse in terms of size, region and community leadership experience to develop a cohesive learning community. This was a sentiment that was echoed by others at different points in the survey, which suggests that regional networks may be preferable. Still, the diversity of Alpha did not make the experience a negative one for most. In addition, one participant was expecting the purpose of the CLN to be that community foundation leaders would come together around important, specific topics and learn how to cooperatively address these topics and so, was disappointed.

An additional piece of evidence suggesting the deep and broad value of the CLN experience for the majority of participants is that the CLN received high marks in comparison to other valuable skill development opportunities in the field.

When asked to compare their CLN experience to other skill development opportunities that stand out in their minds as *most beneficial*:

- About 62% found the CLN *more personally beneficial* than other skill development opportunities that stand out as the ones they have benefitted from the most. Another 29% found the CLN process equally beneficial to other opportunities they have benefitted from most. Only 9% (3 individuals) found it less beneficial.

- About 64% felt the CLN was *more beneficial for their organization* than other skill development opportunities that stand out as the ones the organization has benefitted the most from. Approximately 27% felt the CLN was equally beneficial. Only 9% (3 respondents) felt the CLN was less beneficial. Two felt the costs of time and money outweighed the benefits. One felt that the field lacks cohesiveness and common practices, especially when it comes to community leadership, so the process could not offer specific best practices yet.

- About 47% felt they gained *more applied knowledge* compared to other skill development opportunities that stand out as the ones they have benefitted the most from. Another 44% gained an equal amount of applied knowledge. And 3 respondents again felt that they had gained less applied knowledge. In one case it was because they had previously benefitted from skill building sessions more tailored to their individual community foundation role.

Given that participants were asked to compare the CLN to other opportunities that had previously provided participants and/or their organizations with the highest utility and quality, the fact that 91% found the CLN to be equally or more beneficial is striking.

> "This has been one of the most powerful experiences I have had during my work with the Foundation. I would without hesitation sign on for any follow up/alumni events."
>
> "This type of peer learning is great and fluid in that, as the participants change, insights and opportunities also change. Great learning and engagement model for those trying to implement leadership efforts in their communities."

While the vast majority of respondents (91%) felt that the CLN was as or more personally and organizationally beneficial, as noted above, there were three people (9%) that felt that the CLN process was less beneficial than other skill building opportunities from which they or their organization had benefitted most. Interestingly, the negative respondents were not necessarily

the same across these three questions so some felt the process was more organizationally beneficial while others felt it was more personally beneficial.

**Summary of Satisfaction**
The survey data clearly demonstrate that the majority of respondents were highly satisfied with the CLN process and felt that the benefits reaped were worth the investment of time and energy. A uniquely intensive, applied peer learning design benefitted individuals and organizations in a broad variety of ways that will be explored further in the next section.

However, there was a small minority of people with concerns about the costs relative to the benefits of the process. Two participants did not feel that the time commitment for senior staff and board members was worth the benefits reaped from the CLN process, particularly for organizations that were more advanced in their community leadership work. Concerns related to the feasibility of broad replication of the CLN were also expressed by three of the participants. In addition, there was a concern that the Alpha CLN was too diverse in terms of size, region and community leadership experience to develop a cohesive, on-going learning community. Finally, one participant was expecting the CLN to bring community foundation leaders together by region to learn how to collaboratively address specific issues and so, was disappointed.

## Impact of the CLN Process

**The majority of survey respondents reported changes to staffing, finances, programming and/or policies and processes in their organizations that fall in line with the goals of the CLN and reflect capacity building in line with the community leadership framework. CLN members reported broad, deep and identifiable changes in community leadership capacity. Evidence also suggests that the CLN participants are on the leading edge of the field in their practice of community leadership.**

**Perceptions of Growth in Capacity to Practice Effective Community Leadership**
The survey offers evidence that a majority of the CLN participants felt that their organizational capacity to practice effective community leadership increased as a result of the CLN.

For instance, 76% of respondents agreed (26%) or strongly agreed (50%) that their community foundation is currently better prepared to engage in community leadership than it was before the CLN. Approximately 19% neither agreed nor disagreed and 5% responded N/A.

Additionally, the vast majority of participants felt that they were closer to attaining an ideal definition of community leader after the CLN than they were before the CLN.

Respondents were asked to rate their community foundation on a scale from one to ten relative to the community leadership framework definition of community leader, before and after the CLN:

"The community foundation is a catalyzing force that creates a better future for all by addressing the community's most critical or persistent challenges, inclusively uniting people, institutions and resources, and producing significant, widely shared and lasting results."[3]

A rating of one indicated that there was little to no community leadership capacity and ten indicated that the organization had attained what is set out in the above definition. They were asked where they felt their foundations fell on the scale before the CLN and after the CLN.

- Overall, 81% of the respondents perceived growth in their organization's community leadership capacity from before the CLN to after the CLN. This indicates that the vast majority of respondents felt that the CLN contributed to positive shifts in organizational community leadership capacity.

- Nineteen percent reported no growth (and no decline) in community leadership capacity. All of these organizations considered themselves to have high capacity at the start of the CLN.

- Fifty-three percent of respondents rated themselves a 6 or lower before the CLN whereas only 14% rated themselves a 6 or lower after the CLN, indicating major perceived growth.
- On average, respondents noted an approximately 1.4 point increase on the scale.

- However, organizations that rated themselves a 6 or lower before the CLN, reported an average growth rate of 2.4. This means that organizations that considered themselves less experienced with community leadership at the start of the CLN, felt that their organization's community leadership capacity had grown more over the course of the CLN. Those that started with more perceived capacity (a rating of 7 or above) had less room to move on the scale and reported smaller changes. This finding suggests that significant changes in capacity get more difficult as the organization gets closer to the ideal definition of "community leader." This is not a surprising finding but may help guide thinking about where the CLNs will have the most bang-for-the-buck from a capacity building standpoint.

- As noted above, noticeable changes in capacity appeared to be more difficult to institute (at least over the course of the CLN) for those perceived their organization's community leadership capacity level to be high before the CLN. This conclusion is also supported by the fact that the 19% of respondents that did not note a positive (or negative change) had given themselves a high starting rating of seven or above.

---

[3] Community Leadership Framework for Community Foundations, December 2008 (p. 2), Council on Foundations

**Organizational Changes Related to the Community Leadership Framework Building Blocks**
Ultimately, the CLN was intended to help organizations make deep and broad changes to the way they do their work within their organizations and within their communities. Because this was an inaugural effort, it was difficult to anticipate exactly what those changes might be but with the community leadership framework used as the CLN's guiding document, it is fair to evaluate whether the process was able to help participants make changes that fell in line with the building blocks contained in the framework. The primary elements of the framework include having: A.) the values, culture and will; B.) the relationships; C.) the resources; and D.) the knowledge and understanding that undergird community leadership. The following sections look at the organizational changes reported related to each of these elements.
One piece of evidence that the CLN was effective in building community leadership capacity is that 91% of respondents said that the CLN facilitated progress in a broad and deep number of areas and cited a number of accomplishments that resulted (partially or directly) from CLN participation. It is too early to measure the long-term outcomes of these changes, however, the changes reported have the potential to deeply impact the work of the foundations.

First, the participants were asked to think about 18 specific building blocks presented in the community leadership framework for individual community foundations and think about the level of progress they had made on each – no progress, fair progress, did not focus on, some progress, or significant progress.

| Progress on Building Blocks from the Community Leadership Framework During the CLN | Some or Significant Progress | Did Not Focus | No or Fair progress |
|---|---|---|---|
| Incorporating community leadership (CL) into work plans | 83% | 11% | 6% |
| Choosing and timing leadership Issues | 77% | 17% | 6% |
| Incorporating CL into strategic plans | 74% | 23% | 3% |
| Equity, diversity and inclusion | 74% | 12% | 14% |
| Making CL part of mission statement | 73% | 27% | 0% |
| Measuring the impact of CL work | 69% | 14% | 17% |
| Board Engagement | 67% | 18% | 15% |
| Orienting staff composition or alignment toward CL ends | 65% | 23% | 12% |
| Developing messages that work | 63% | 14% | 23% |
| Board composition | 62% | 32% | 6% |
| Engaging community voice | 62% | 29% | 9% |
| Engaging donors and other co-investors | 62% | 15% | 23% |
| Developing a business model that supports CL | 59% | 26% | 15% |
| Evaluating internal changes | 59% | 32% | 9% |
| Board roles and responsibilities | 52% | 42% | 6% |
| Advocacy and public policy | 44% | 50% | 6% |
| Committee structure | 37% | 57% | 6% |

(Response rate for this question was 92%)

Some or significant progress was most commonly made on the building blocks that are most tied to core planning documents that serve as the short and long term strategic guides for these organizations and to the core values of equity, diversity and inclusion:
- Incorporating community leadership into work plans
- Choosing and timing leadership issues
- Incorporating community leadership into strategic plans
- Equity, diversity and inclusion issues
- Making community leadership a part of the organizational mission statement

Of the building blocks where some or significant progress was made, the *most significant* progress was reportedly made, with over one quarter to one third of respondents reporting significant progress, on the following:
- Addressing equity, diversity and inclusion issues (37% reported significant progress);
- Board engagement (32% reported significant progress);
- Incorporating community leadership into strategic plans (31% reported significant progress)
- Incorporating community leadership into work plans (29% reported significant progress)
- Board composition (27% reported significant progress)

When their responses were analyzed separately, CEOs also indicated that *significant progress* was commonly made on choosing and timing leadership issues (44%) and making community leadership part of their organizational mission statement (47%).

Again, the building blocks where the most progress was reported represent those that are closely tied to foundational planning documents and core cultural elements of the organizations including board composition and engagement and attention to equity, diversity and inclusion issues. This is another indication that the CLNs supported foundational changes in the majority of participating organizations.

CLN participants also reported that they most commonly *did NOT focus* on:
- Committee structure (57%)
- Advocacy and public policy (50%)
- Board roles and responsibilities (42%)
- Evaluating internal changes (32%)
- Board composition (32%)

Some respondents commented that they did not take these on because they felt that they were stable in these areas. Some participants felt that these were issues that would be tackled later in their community leadership development and other areas should be focused on first.

Participants reported some progress on orienting staff composition and alignment toward community leadership ends and on engaging community voice.

Finally, participants indicate that they made the *least progress* on:
- Developing messages that work (23%)
- Engaging donors and other co-investors (23%)
- Measuring the impact of community leadership work (17%)
- Board engagement (15%)
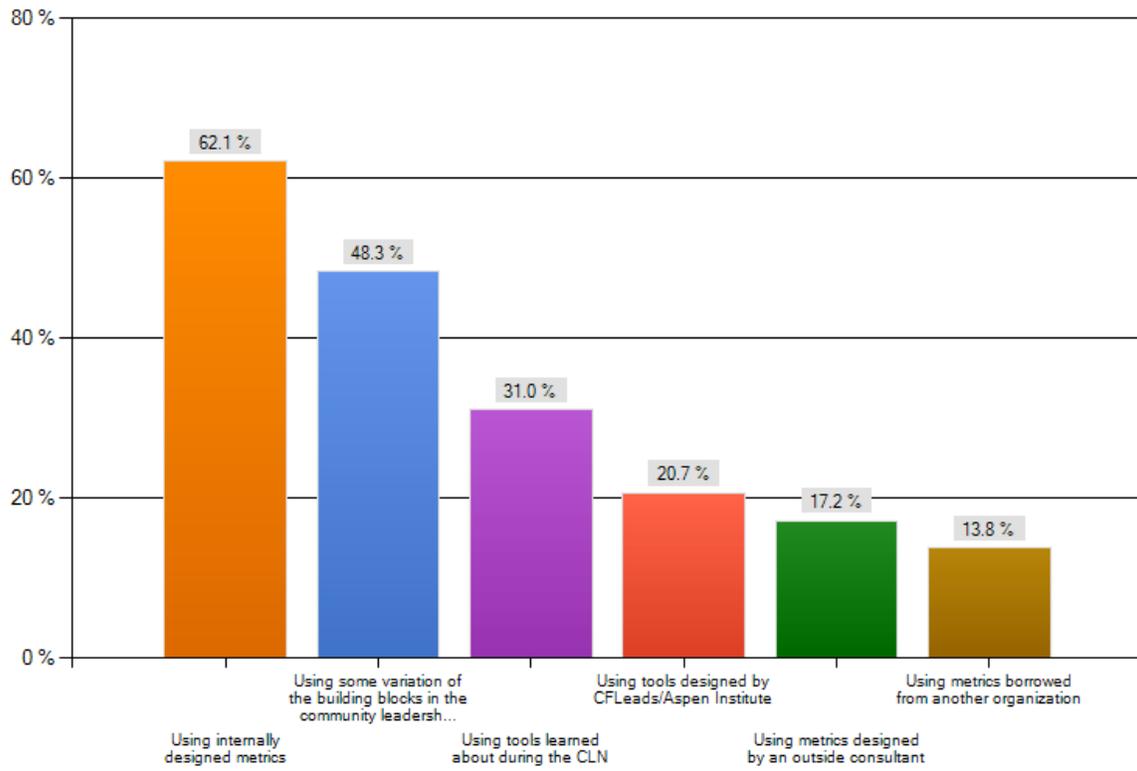- Developing a business model that supports community leadership (15%)

These are also core areas of operational significance that represent some common barriers to taking on community leadership.  How does an organization fund their community leadership work and how do they structure their organization so that community leadership works symbiotically with more traditional activities?  How do they measure the impacts of community leadership work and explain their work to the public?  For each of these, there were other participants in the same CLN that made significant progress (particularly on board engagement) that could serve as examples for those who struggled.  These are areas where future CLNs might want to focus additional attention or provide follow-up support after the CLN.

---

**Going Deeper - The Trouble with Metrics:**

While many (68%) felt they made some or significant progress on evaluating community leadership impact, the need for more support around metrics is obvious.  The philanthropic field generally struggles with evaluating impact and data from the survey indicate that this is a gap that the CLN helped address but that longer-term efforts would be necessary to fill it.

When participants were asked how they measured the internal changes they were making in their organizations, many cited that they were using tools they had gained through the CLN.  More specifically, approximately 48% said they were using some version of the community leadership framework to measure internal changes, 21% said they were using tools designed by CFLeads/Aspen Institute and 31% said they were using tools learned about during the CLN.  Approximately 62% of participants also reported that they were using internally designed metrics to measure internal changes.  Most often these internal metrics included reviewing strategic plans to see whether the organization was on a path to accomplishing goals, visioning processes, review of goals of grants per grantee reports, and assessments of dollars in and dollars out.  Many reported that this was an area where additional post-CLN support would be useful.

---

**How CLN participants are measuring the internal changes they are making/have made in their organizations?**

Bar chart values:
- Using internally designed metrics: 62.1 %
- Using some variation of the building blocks in the community leadersh...: 48.3 %
- Using tools learned about during the CLN: 31.0 %
- Using tools designed by CFLeads/Aspen Institute: 20.7 %
- Using metrics designed by an outside consultant: 17.2 %
- Using metrics borrowed from another organization: 13.8 %

When asked how they measure the impact of their community leadership (as compared to how they are measuring impacts of internal changes), about one quarter of the respondents said that they did not yet know how to measure organizational impact. Another fourth measured impact on a project-by-project basis and/or used the measures provided by grantees as measure of their impact. One fifth of the respondents were in the early stages of developing processes and frameworks for measuring impact. Another quarter reported using the more traditional but shallow measures of dollars granted and raised, number of convenings, and/or number of partnerships formed. A small minority of respondents reported using more revealing measures of impact including return on investment measures, economic loan development data, job creation and training data, and social capital data.

While all of the measures listed can be useful to collect, it is obvious that participants are struggling with how to measure the community impact their community leadership work has over time.

Many participants are moving forward however. One CLN participant has already recruited a community foundation leader from their CLN to come and speak to their board about how to think about community impact. In addition, at least two have hired Yellow Wood Associates, a presenter at the CLN, to aid in developing outcomes and metrics for their organizations. Ensuring that there is on-going sharing as CLN members develop their techniques would be useful, as would case studies and other forms of knowledge building for the field more generally on this topic.

**Tangible Resource Changes**
Diving into the specific types of changes that were made, CLN participants cited changes to staffing, finances, board engagement, as well as, plans, policies, programs and processes that had been made or that are planned for the coming year.

Staffing changes
Survey respondents report that they are:
- Reconfiguring staff structure and/or job descriptions, including those of senior leadership, to focus more time on community leadership work;
- Increasing the number of staff working on community leadership initiatives;
- Rethinking the skills that board and staff will need to engage in community leadership work (including both what will be important in hiring and training);
- Providing dedicated board and staff retreats to prepare them to take action;
- Hiring new staff to beef up community leadership capacity;
- Increasing focus on racial equity

Dollars devoted to community leadership
Survey respondents report that they are:
- Raising dollars specifically to support community leadership
- Committing more grant dollars to community leadership work
- Altering funding strategies in line with community leadership goals by committing larger dollars to fewer projects for longer periods of time
- Adding money for research, issue experts, and travel to visit model projects
- Thinking about how to align community leadership and development/fundraising over the long-term
- Developing policies on and doing mission related investing
- Restructuring budgets to track costs and staff time to help measure return on investment of community leadership activities

Each of these changes represents both commitment to practice community leadership and tangible efforts to alter the resources (time, dollars and skill) flowing to community leadership work.

Ideally, to understand the impact of the CLN on participants, there would be a non-CLN control group with which to compare CLN participant progress.  The only such data that exists is in the form of a national survey of community foundations that was done in 2006 and 2007.  That 2007 survey data provides a comparison group by which to judge whether or not the CLN participants are investing more in community leadership now than the average.

Interestingly, comparing the survey data to the most recent national data (the same data has not been collected since 2007), it appears that CLN participants are indeed investing in increasing their community leadership capacity at a higher rate than is the recent historical norm in the community foundation field.

About 85% of survey respondents indicated that they had made changes (79%), or planned to make changes in the coming year (6%), in resource allocation (staff time and/or finances) to increase their organization's community leadership capacity. The same question about resource allocation to community leadership was asked of community foundations nationally on a 2007 national survey (conducted by FSG). In comparison, in the 2007 national sample, approximately 53% had made changes and an additional 12% planned to make changes for a total of 65% of organizations that were investing in community leadership.[4]

Organizations that made clear that their resource changes devoted to community leadership pre-dated the CLN, also noted that the CLN had encouraged progress in their community leadership work. One organization noted that the CLN helped them become more intentional and less sporadic in their community leadership work. One had reassessed their commitment and had decided to re-up their investments in their community leadership goals. Another had been encouraged by their CLN participation to continue to take increasingly progressive stances on community leadership issues.

---

"Participating in CLN affirmed the direction of [our community foundation] in building both financial capital and social capital to serve the community. Using the resources of CF Leads, we were able to persuade our board to continue with leadership efforts during last year's challenging financial times. We continue to use the resources and tools we were exposed to at CFLeads [CLN] to guide, broaden, strengthen and sustain our community leadership efforts."
"The foundation has been exercising community leadership for a good period of time. The CLN helped hone and focus our skills."

"CF Leads provided the rationale -- the case statement -- to continue to strengthen and enhance [our] community leadership efforts. The framework and cool tools gave us the information we needed to do it. The relationships that were strengthened and formed help support our efforts."

"Confirmed the direction in which we were moving especially in light of a down economy."

"The train was already on the track, so to speak, around community leadership in our organization. The CLN fit nicely with our direction and supported the work."

---

[4] "Feedback from the Field 2006 & 2007 Survey Results on Community Leadership" prepared for CFLeads by FSG Social Impact Advisors, March 5, 2008. An additional survey was conducted in 2009 but the data were not available at the time of the writing of this report. It should be noted that when FSG's national survey was administered in 2007, the National Task Force (NTF) on Community Leadership had not completed their work on the Community Leadership Framework for Community Foundations. The Framework defined community leadership for the field and this definition was used extensively in the CLNs. When the FSG survey was administered in 2007 the definitions of community leadership that the 211 respondents to the national survey were working from were their own individual definitions of community leadership. It is possible that the definitions they were using were more or less rigorous than the one presented in the framework. Regardless, the CLN members were working from the common, comprehensive definition developed by the NTF whereas the rest of the field was not. This fact makes the comparison of the 2007 data and the comparison of the present CLN data less precise. However, the data offers interesting insight into the priority that the CLN members place on investing in community leadership, as compared to the priority placed on community leadership investment by the community foundation field more generally in 2007.

<u>Changes to Plans, Policies, Programs and Processes</u>
Beyond the changes made to staffing and finances, the majority of organizations also reported shifts in their plans, policies and/or processes.  Specifically, survey respondents reported that their organizations had:

- Completed a new strategic plan using time and information from the CLN
- Incorporated community leadership into strategic and work plans
- Revised policies on public advocacy
- Modified grant making guidelines to encourage more community leadership investment
- Studied the role of foundations in social change
- Eliminated some program work and streamlined processes to focus energy on community leadership initiatives
- Begun to create an evaluation framework to measure organizational progress
- Initiated work to create a framework for measuring results and impact
- Increased accessibility of their community foundation by moving to a place with free parking and larger meeting space
- Formed a new 501©3 to support community leadership work
- Dramatically increased convening
- Adapted CLN models and criteria to create a matrix for evaluating community leadership opportunities and selecting which ones to tackle
- Committed to create statewide tools to support philanthropy and civic engagement
- Increased commitment to take a stand on issues that were previously sidelined such as diversity
- Altered vision and values
- Changed the way the foundation communicates its work to the public - revamped the website to focus on community leadership and changed marketing materials

"We have engaged in foundation wide (board, staff, volunteers, programs) reviews and realignment to be consistent with our core focus areas including changing staff structure and job descriptions, modifying our grant making guidelines to ensure grants are in line with core areas, exploring the role of foundations in social policy/change process, moving toward mission related investing, taking a lead in convening in the area of workforce development, dedicating board and staff retreats to moving into the action phase of our strategic planning done several years ago.  We are now in the realigned phase and putting our time, resources, and funds to work in a manner consistent with our community leadership capacity as identified during our strategic planning and, in part from the process we went through during our time in the CLN."

"Our board formally endorsed increased CL work in May 2006.  During the time of our participation in the CLN, we were moving forward in a number of areas to strengthen community leadership capacity and community leadership roles in the community.  As noted above, CLN presented some models and criteria that could be adapted when we evaluate community leadership opportunities and we now are working on formalizing policy and criteria, restructuring grant procedures and setting in place overarching goals and outcomes to benchmark and communicate community leadership work more effectively."

Again, this wide variety of changes to program activities and internal processes that the CLN initiated or spurred fall in line with the goals of the CLN to help community foundations make progress on action plans, employ new methods and utilize new tools and understandings. These changes are also in line with the building blocks provided by the community leadership framework and thus, are evidence of the short-term successes of the CLN.  Whether these changes lead to increased community impact is a longer-term question.  However, many of these represent fundamental changes to the depth of, type of, and approach to community leadership work for the CLN members.  Given that the community leadership framework is essentially a theory of change that describes the elements that need to be in place to create community leadership organizations that have greater community impact, the reported changes represent steps towards increased impact.

**Understanding of Community Leadership**
Growth in understanding and knowledge were additional goals of the CLN that were met. Underlying the more tangible changes in organizational resources, processes, policies and programs, CLN participants also reported changes in their understanding and knowledge about community leadership.

When asked how they would describe what they learned, in free response answers more than half of survey respondents volunteered that the CLN provided participants with a deeper and more nuanced understanding of the:
- Elements of community leadership
- Depth and breadth of leadership work being done
- Importance and benefits of community leadership
  And/or
- Difficulties and limits of leadership roles

> "I learned about why Community Foundations are so uniquely positioned to serve as catalytic leaders in the community. I learned about the essential elements a [community foundation] needs to be an effective leader and was exposed to cutting edge tools to help make it happen. I met a number of incredible innovative, passionate, dedicated, and fun individuals."
>
> "I learned of the unbelievable potential Community Foundations have to make significant impact in the communities they serve."
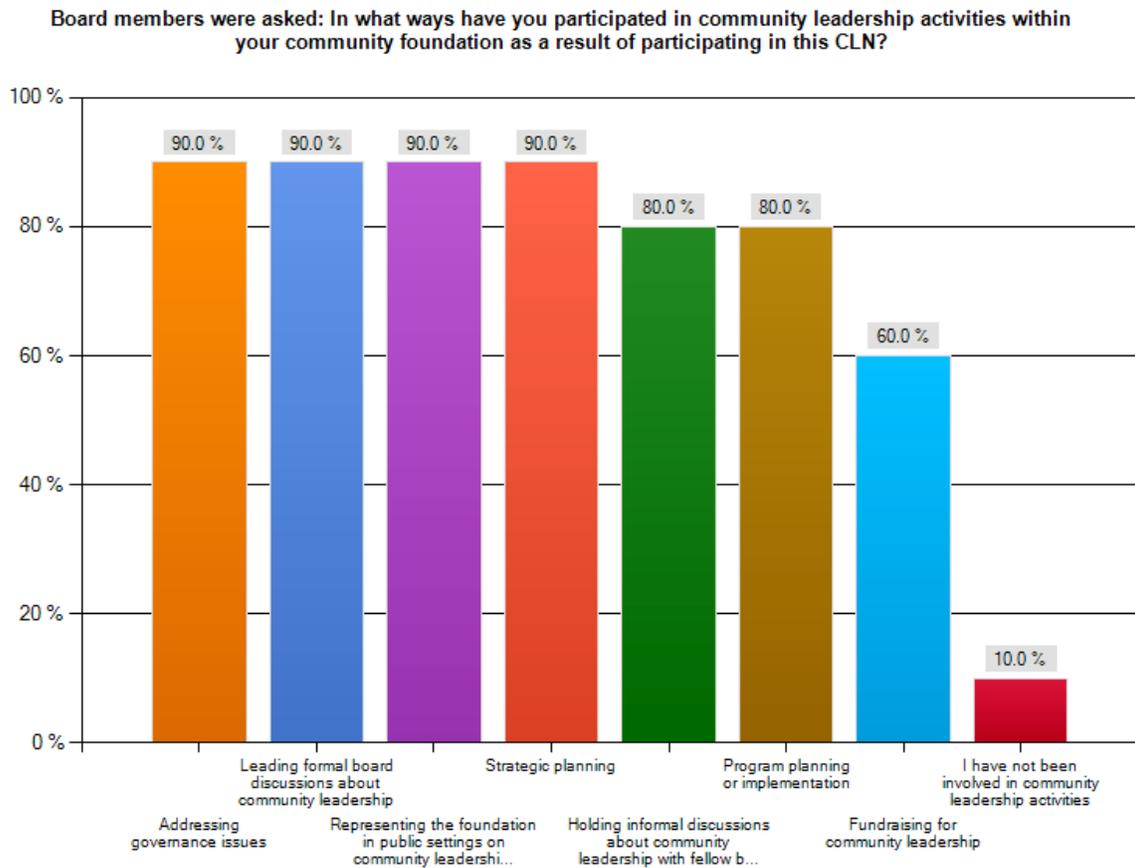
**Values, Culture and Will**
The necessity to examine the values, culture and will of the organization as well as develop the organizational the values, culture and will to take on community leadership work is an essential part of the NTF Framework. The survey data offer evidence that the CLN process did help to strengthen the internal community leadership values, culture and will to practice community leadership within most of the participating organizations.

For instance, 84% of respondents agreed or strongly agreed that their community foundation is as committed or more committed to engaging in community leadership activities than it was before the CLN. Over half of participants strongly agreed and the remaining respondents neither agreed nor disagreed.

Board Engagement

A key element of building an internal culture and the will to do community leadership work, is to have a board and staff that share a related and common set of understandings, goals and values, as well as a desire to engage in community leadership work. The majority of organizations reported shifts in board of directors/trustee support of staff in their community leadership work and of board participation in leadership activities.

Board members appear to be engaging more deeply in community leadership work as a result of the CLN and report that they are helping to persuade, recruit and engage fellow board members on community leadership topics.



Board members were asked: In what ways have you participated in community leadership activities within your community foundation as a result of participating in this CLN?

When asked how they have participated in community leadership work, 90% of the board members that responded to the survey stated that "as a result of participating in this CLN" they had lead formal board discussions about community leadership, represented the foundation in public settings on community leadership matters, participated in strategic planning related to

community leadership initiatives and addressed governance issues. Only one board member reported that he had not engaged in community leadership activities.

In addition, 80% of board members said that "as a result of participating in this CLN" they had held informal discussions about community leadership with fellow board members and engaged in community leadership related program planning and implementation and 60% had been involved in fundraising for community leadership *as a result* of participating in the CLN.

Community foundation staff members also reported that there has been more board support for community leadership activities and more board focus on community leadership as a result of the CLN.

"Having a board member attend helped.  She made the case to our overall board to continue our leadership when we were looking at cuts last fall, and I think it made a big difference."
"The inclusion of Board members in the process helped to fold community leadership in to our DNA."

Specifically, non-board members reported the following changes to board engagement in community leadership in their organizations:
- In one organization, participation in the CLN reportedly triggered the board chair to take action to diversify the board and as a result, the first person of color in the community foundation's history was elected to the board.

"Absolutely, The CLN was the catalyst for helping our trustees dramatically change the complexion of our board.  The board elected its first African American after 63 years of service to the Spartanburg community.  The design of the teams, the expertise of the staff and the learning was outstanding and it provoked us to get out of the box to do bolder work."

"Peer interaction made all the difference for building our trustees capacity to have the courage to deepen the dialogue around board diversity."

- In at least one organization a board member made the case to continue community leadership activities despite budget cuts.
- More generally, staff members reported that their board members:
  - Had more belief in the effectiveness of community leadership
  - Became advocates of community work despite budget cuts
  - Became more aligned with staff around community leadership goals and actions
  - Held board meetings specifically on community leadership
  - Began supporting the staff in spending time on lobbying

Those that noted changes in board understanding of community leadership and engagement in community leadership activities shared that the CLN facilitated greater engagement by:

- Improving communication between board and staff about community leadership by providing common language, common examples and understandings, and time to reflect and focus on common goals.
- Helping convince board members that community leadership is an effective approach and many community foundations are moving that direction.
- Giving staff and board a chance to figure out how to formally integrate community leadership into the institution.

**Changes in Supportive Peer Relationships**

In addition to internal motivation and preparation, another element that has been presented as an essential element of capacity to effectively practice community leadership is the presence of strong peer relationships. When asked directly about whether the CLN facilitated development of a supportive peer network that could help hold them accountable in their community leadership work, the vast majority (82%) agreed or strongly agreed that the CLN met the goal of creating a results-oriented network that built their community foundation's community leadership capacity. Fifteen percent neither agreed nor disagreed and three percent disagreed. These numbers were affected by those that felt that the Alpha group was too spread out to provide a lasting peer network.

> "We were accountable to the group as a whole to do our work and the results of each meeting expedited all of our work by possibly years. I think it is critical that staff and trustees be in attendance for all meetings so that there is even more accountability and understanding within your own organization."
>
> "The best parts were the great exposure to other community foundations; learning from each other; learning some new tools; setting specific goals for our organization and being held accountable for their progress."

Several of the participants noted that they had followed up on connections made through the CLN with peer and other experts in specific areas and are working with these people to improve aspects of their community leadership work. For instance, at least two CLN organizations have tapped Yellow Wood Associates, a presenter at the CLNs to help design outcomes and metrics. One organization continues to work with Aspen Institute. Spitfire Strategies, another CLN presenter, has been tapped to help with communications. Lew Feldstein, former President of the New Hampshire Community Foundation, was brought in to present to the full board of one CLN participant organization. In addition, one brought Steve Joul, CEO of Central Minnesota Community Foundation, to speak to their board about evaluation.

In essence, the CLN process expanded the personal/professional networks of attendees and in so doing, expanded the resource base of community foundation and other experts that the CLN members can tap.

**Focus on Minnesota**

Phone interviews with a few of the Superior CLN participants have revealed that the CLN helped to establish new and tighter bonds between community foundations operating in Minnesota. Those relationships have already generated lasting benefits for the organizations that are arguably likely to benefit their communities.

Executives at the West Central Initiative Foundation (WCIF), for instance, noted that the benefits of the CLN have gone beyond the ten-month tenure of the initial CLN.  The CLN itself offered time to step back and think about their work, offered exposure to what worked for other groups, and provided an opportunity to get honest peer feedback.  "We're in a rural area and we're the biggest grantmaker in that area.  It's hard to get honest feedback.  So getting together with peers from areas that won't be applying to us for funds and will be honest with us is really valuable."  Connecting with peers reduced the feeling of isolation the grantmakers felt, helped them reassess the realism of their goals, and opened up a regional pool of resources for their organization to tap.

For instance, WCIF staff noted that they had brought people from St. Paul to do the Facing Race program on dealing with diversity with their organization.  In addition, they noted that they have been exposed to the Central Minnesota Community Foundation's work on racial and ethnic diversity.  CMCF's approach represented a different way of addressing diversity than WCIF had ever conceived of.  Despite the fact that it felt like a riskier approach, a WCIF staff person notes, "I think it encouraged us to push our limits a little bit and made us think about approaching some of those tougher topics."

They also discovered tools that they plan to take advantage of in the future.  The WCIF staff noted that the Duluth-Superior Community Foundation created a civility project to help people learn how to speak to one another respectfully and especially how to speak to elected officials respectfully.  One WCIF staff member noted that the next time a county board meeting blows up, "we know who to contact for resources to work on those issues."

Overall, the WCIF staff members noted that they are in closer contact with their regional peers as a result of the CLN experience.  Executives from a few of the organizations actually organized and held a mini-retreat recently as a result of the CLN meetings.  These on-going connections are resulting in new collaborations and partnerships for other Minnesota community foundations as well.

At the Central Minnesota Community Foundation (CMCF), one of the outcomes of on-going contact with other CLN members has been an informal process of information sharing.  Steve Joul, President of CMCF, noted that his team had talked to a number of other foundations about the process CMCF uses to determine when to engage in a community leadership initiative.  Those foundations had used CMCF's structure to help develop their own metrics for the health of the community and their own criteria for determining what roles they will and will not take on.  Since the CLN, those organizations have shared back the metrics and criteria they've developed with CMCF.  CMCF is looking at how others have built on and improved their original tool and will be refining their metrics and criteria based on what they learn.  Joul notes:

"We're in a wonderful field where open sharing of information is encouraged and we take from it and learn from one another and create better organizations because of it. The true value and return on investment is difficult to measure…The concept of bringing community foundations together in structured conversation for more than just an annual conference but in a three or four-time opportunity to dialogue and get to know one another was extremely valuable for this information sharing."

The benefits of the CLN have gone beyond tool and information sharing, however. As in many states, Minnesota has several community foundations whose territories overlap. As a result, the environment can be more competitive than collaborative for the community foundations there. Joul notes, "What we discovered is that when we came together at these meetings for CLN, we developed relationships and partnerships that are really lasting beyond the CLN in a very positive way… What has come from the relationship building is partnerships and a common vision." Below are two concrete examples of the shifts in relationships that are occurring in Minnesota.

First, CMCF set up the Minnesota Real Estate Foundation a few years ago and it struggled. Drawing on the relationships developed and nurtured through the CLN, however, a partnership was developed between CMCF, the Minnesota Real Estate Foundation, the St. Paul Foundation and the Minneapolis Foundation. Now the Minnesota Real Estate foundation is truly an entity serving community foundations across the state and is more financially stable.

Another example of the benefits that have come out of the relationships generated through the CLN involves another collaborative endeavor. The St. Paul Foundation created an on-line giving portal and asked other community foundations in the state to support it financially and to become partners in the venture. Joul notes, "Now if you would have told me five years ago that that would happen, I would have said 'you've got to be kidding. We see them as competition, why would we do that?' But they have become more respectful in their understanding and in looking at their territory and the Minneapolis and St. Paul leaders have been phenomenal at working and developing these relationships."

Overall, Minnesota foundations report that closer ties, more knowledge and tool sharing, less competition and greater collaboration have resulted directly from the time spent together in the CLNs.
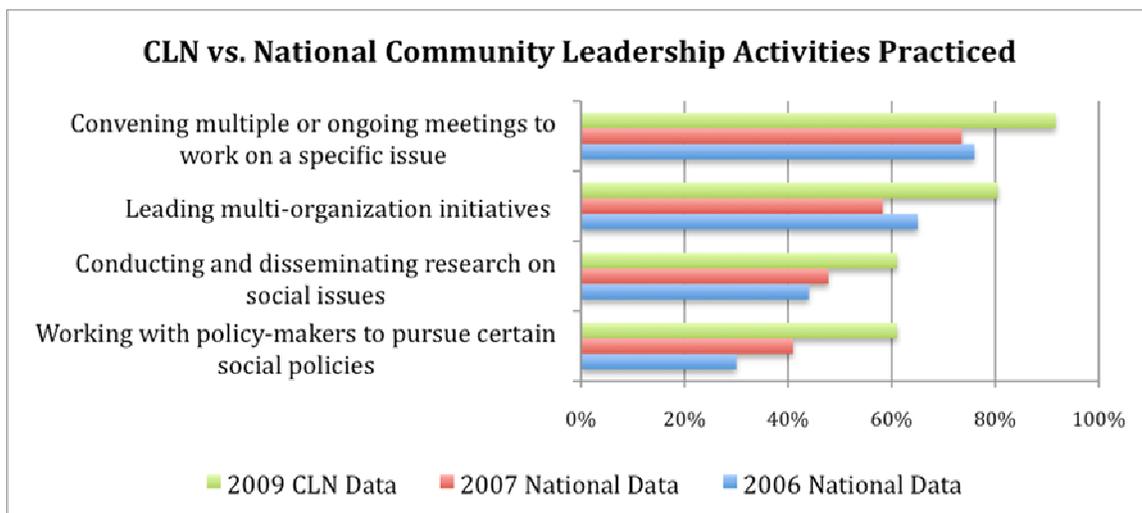
**Community Leadership Practice – Leading the Field**
Given the CLN's larger goal to push the field toward community leadership practice, it is important to try to assess whether the community foundations engaged in the CLN are on the leading edge of the community foundation field when it comes to community leadership practice. The survey provides some evidence that the CLN organizations are more engaged in community leadership work than is average in the community foundation field.
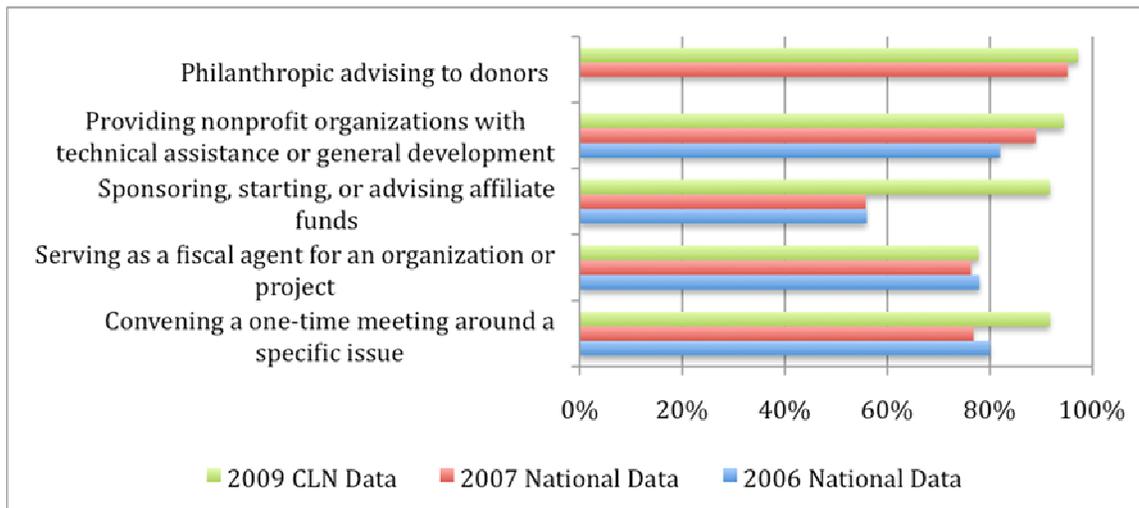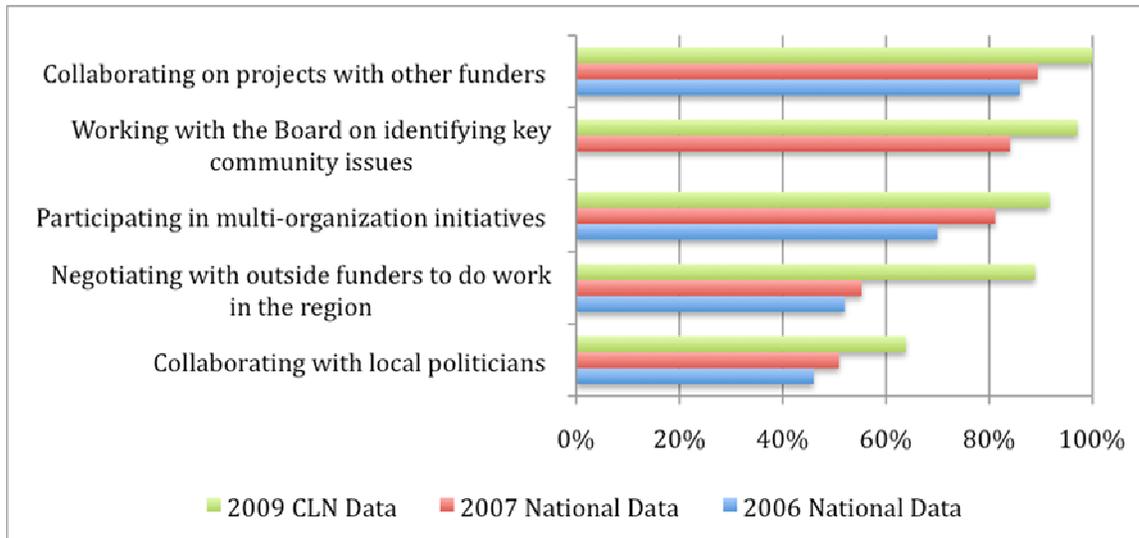
The CLN participants were asked about their beliefs about community leadership and the community leadership activities their organizations engaged in.  In order to identify whether or not the community leadership understanding and practice of the CLN participants was more advanced than average, a control group would be necessary.  Here again, national survey data is used as a proxy for a control group.

The two questions used to gain deeper understanding of specific community leadership practices of the CLN participants were also included in the 2006 and 2007 national surveys.  Three interesting findings come out of comparing the responses of the 2009 CLN members to the national survey responses from the field:

First, CLN members think about community leadership in terms of long-term investments, policy change and philanthropic advising as community leadership work.  Compared to their peers nationally, a far lower percentage consider collaborating with politicians, serving as a fiscal agent or convening a one-time meeting around a specific issue to be community leadership activities.  While all of these things could be community leadership activities, the focus on long term, deep impact activities as community leadership is in line with the community leadership framework.

Second, the CLN members are engaging in all community leadership activities at higher rates than is average for the community foundation field, according to national survey data.  In particular, CLN members are working with policy-makers to pursue certain social policies; negotiating with outside funders to do work in their regions; sponsoring, starting, or advising affiliate funds; and/or leading multi-organization initiatives at higher rates than the rest of the field.



CLN vs. National Community Leadership Activities Practiced

Chart legend: 2009 CLN Data, 2007 National Data, 2006 National Data

Categories (top chart):
- Collaborating on projects with other funders
- Working with the Board on identifying key community issues
- Participating in multi-organization initiatives
- Negotiating with outside funders to do work in the region
- Collaborating with local politicians



Chart legend: 2009 CLN Data, 2007 National Data, 2006 National Data

Categories (bottom chart):
- Philanthropic advising to donors
- Providing nonprofit organizations with technical assistance or general development
- Sponsoring, starting, or advising affiliate funds
- Serving as a fiscal agent for an organization or project
- Convening a one-time meeting around a specific issue

This higher level of practice is not directly attributable to the CLN because there was an undeniable selection bias going in. Those organizations that were chosen already had a commitment to and generally, some track record of practicing community leadership. In addition, because there is no pre-CLN baseline, it is not possible to tell whether the CLN participants began engaging in these activities following the CLN. However, given the responses of the survey respondents, it can be safely assumed that the CLN either strengthened practice in these areas, inspired entry into these areas, or affirmed the work being done in these areas.

**Summary on Impact**
According to the survey respondents, for the majority of participants the CLN had both tangible and intangible impact on organizational structures and processes, as well as, impact on understanding, values, relationships and will. The benefits stem from what the CLN had to offer including: the valuable peer and other expert resources; a rationale and framework for

23

strengthening and enhancing community leadership methodically; a peer network; new tools; more engaged and supportive board members; a justification for the community leadership path; clarification around the meaning of community leadership and partnership roles; a spotlight on the importance of focusing on equity and diversity; and the opportunity to focus on an applied community leadership project. The strongest elements of the CLN are highlighted in the next section.

### Key Attributes of the CLN Process

In order to better understand how the CLN accomplished the impacts that were reported, it is important to evaluate which elements of the CLN process held the most utility and for which participants. And in the interest of improving future efforts, it is important to understand which elements held the least utility.

**Peer learning**

The survey asked several open-ended questions about the strengths of the CLN process. Every participant, at some point in the survey, cited peer-learning as one of the most impactful parts of the CLN. Specifically, respondents noted that the face-to-face peer-learning element was unique (does not exist elsewhere in the field) in its structure, intensity and value. The multi-meeting process, which took place over the course of ten months, helped to build new and strengthen old relationships in ways that provided both practical benefits and personal rewards. In some cases, relationships formed and strengthened have already contributed to continued learning and sharing (see section on impact).

> "Peer learning, reflection and a year-long approach that allows for testing out ideas and bringing back the experience to reflect on and share with peers."
>
> "I learned form others how they have utilized their leadership roles to build their foundations. Interaction with the other foundations was very educational and the relationships that were developed will continue."

The survey questions that asked specifically about the peer-to-peer learning provide direct evidence that face-to-face time with peers was key.

- 92% agreed or strongly agreed that face-to-face time with peers provided by the CLN is essential for building trust and strengthens the potential for future communication and cooperation amongst community foundations (54% strongly agreed with this statement). About 5% neither agreed nor disagreed while 3% disagreed.
- 88% of respondents felt that face-to-face time with peers and other field experts was an essential element of the CLN.
- In addition, 86% felt that informal time for networking and socializing should be maintained as an essential CLN element.
- The two leaders of regional associations of grantmakers also reported the face-to-face peer learning as the core element of the CLNs impact.

> "I think peer interaction is an excellent way to get outside your own boundaries. While it is not required to undertake a community leadership initiative, it is helpful in learning the framework and how to effectively implement it and learn along the way. Because this is a strategy that has some nuance to using it, learning from both success and failure and then retooling for the next effort, peer learning can accelerate the learning."
>
> "With board members in particular, if we were going to do it virtually, people would spend time in their offices…it would be unlikely that we would be in the same place to participate and would miss out on that team building time that was so valuable."
>
> "Loved the problem solving sessions with peers. Much richer seminars because of peer participation."
>
> "THE best learning experience possible."

The responses of a majority of survey participants coalesced around the conclusion that the focus on peer-to-peer interaction in several forms (presentations, small groups, and one-on-one time) allowed participants to network, learn from peer examples, receive feedback and guidance, share ideas and information, build relationships, and explore collaborations. More specifically, the CLN participants reported that the benefits of peer learning include that:

- Relationships are resulting in more collaborative work among participating community foundations.
- The CLN built an environment of trust (particularly in Minnesota) essential to collaborative action.
- The process allowed one to get outside of their boundaries through peer interaction and encouraged people to think differently.
- Because community leadership is learning by doing, interacting with peers doing the work accelerates learning.
- Real consulting advice was gained from competent, experienced, caring leaders and aided problem solving. Others who had been down the community leadership road before could share experience, including red flags and what worked.
- Follow-up has occurred between peers regarding issues/ideas/tools shared and has been beneficial.
- Participants had quality team time and got to know their organizational colleagues better.
- Seeing the examples of others helped build the confidence and courage of trustees to take on difficult community leadership issues.

The process helped to build new and strengthen old relationships in ways that provided both practical benefits and personal rewards. In some cases, relationships formed and strengthened have already contributed to on-going learning and collaboration. The peer-to-peer environment also facilitated a sense of accountability that pushed most community foundations to make progress on the issues they brought to the table. In addition, the peer-learning environment encouraged bonding between board and staff within teams.

> "I learned by example of what others are doing but more importantly, as I learned, we had time to reflect and plan for our own community foundation. This CLN was probably the most important part of our process toward being a more effective community foundation."
>
> "This type of peer learning is great and fluid in that as the participants change, insights and opportunities also change. Great learning and engagement model for those trying to implement leadership efforts in their communities."
>
> "I also believe that meeting three times was very valuable. We were accountable to the group as a whole to do our work and the results of each meeting expedited all of our work by possibly years."
>
> "A strength was the process by which elements of the leadership model could be learned, tried out and reported on, as well as receiving feedback from peers."

Interestingly, the structured peer-advising element received more mixed reviews than the other peer-learning elements (informal networking, peer progress on action plan updates, introductory stories, introduction of tools, community leadership stories, time with own organizational team, etc.). Twenty percent of participants felt that this was an element that should be dropped and an additional 26% felt the structured peer advising should be altered. It appears that this is largely due to concerns on the part of some that the pairings were lop-sided with a less experienced organization gaining far more from the exchange than the more experienced organizations. This is another indication that meeting the full spectrum of needs present in the participant CLN organizations in each session was challenging.

> "To be perfectly frank, the peer review sessions were not very helpful to us. I believe that we should have been paired with larger community foundations with more expertise. The matching process needs more attention."
>
> "I didn't feel that all participating foundations were peers. Some were not far enough along on the continuum to provide much benefit."

**Board Participation**

The open-ended questions included in the survey also revealed that board participation was an element of the CLN process that many felt was extremely valuable. Survey respondents repeatedly noted that in other formats, the board and staff work independently of one another, which can lead to board and staff members being on different pages. The opportunity to bring board and staff together in a "neutral" space, with the support of outside experts, allowed for dialogue about values and strategies that contributed to team building, alignment and often, greater board engagement. Board participation was very valuable for building internal organizational accountability, shared understanding, and common commitment to community leadership.

"Authentic leadership is based on values; the CLN provided a safe space for peer (board and staff) dialogue and learning related to the examination of organizational values and leadership alignment/strategies."

"I learned that time away from the office in a safe, neutral environment, with field experts is an invaluable experience for board and staff."

"We learned how to think "intentionally" about our leadership work and we were inspired to see the Board's desire to be more engaged in that effort."

"I got to know the other board members better and I learned techniques and strategies that will help our community foundation plan for the future."
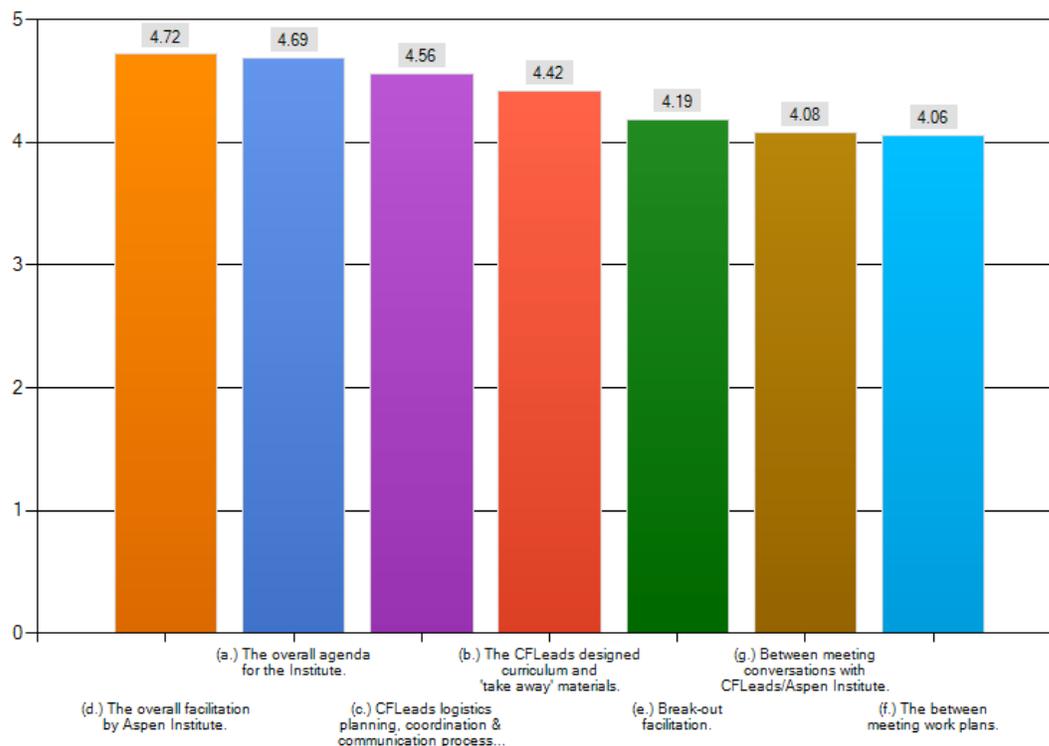
"My only regret is that we only had 3 board members take part. If we were doing it over, I would try to recruit at least 2 more."

In addition, 89% of participants agreed or strongly agreed that board participation in the CLN process was essential to the CLN having a lasting impact on their organization (65% strongly agreed) and should be maintained in future CLNs. Eight percent neither agreed nor disagreed and only 3% (1 person) disagreed with the statement.

**CLN Process**
When asked to judge some of the core elements of the CLN, some of the key strengths of the process were clear while other elements received more mixed reviews. Overall, each of the elements received a 4 out of 5 or higher:

**Participant ratings of elements of the CLN (Scale: 1 strongly disagree to 5 strongly agree)**



Bar chart values:
- (a.) The overall agenda for the Institute: 4.72
- (d.) The overall facilitation by Aspen Institute: 4.69
- (b.) The CFLeads designed curriculum and 'take away' materials: 4.56
- (c.) CFLeads logistics planning, coordination & communication process...: 4.42
- (g.) Between meeting conversations with CFLeads/Aspen Institute: 4.19
- (e.) Break-out facilitation: 4.08
- (f.) The between meeting work plans: 4.06

**Facilitation**

Aspen Institute's facilitation received high marks (4.72 out of 5) with 76% of respondents saying their facilitation was very effective and an additional 20% saying facilitation was somewhat effective. Respondents commented that the facilitation was excellent and provided a mix of learning styles that was helpful for a variety of adult learners. In addition, some respondents felt that it was obvious that the facilitators had done a lot of homework on the participant organizations and had a good sense of their big picture needs. The facilitators also demonstrated their broad knowledge of the community foundation field and the work occurring in the field and this was cited as a key to their effectiveness. The Aspen Institute facilitators experience with their Rural Development Philanthropy Learning Network gave them strong grounding in the community leadership issues faced and their reputation added credibility to the CLN in the eyes of some participants. Thus, it is not surprising that facilitation by Aspen Institute was also considered to be an essential part of the CLN's effectiveness by the vast majority (88%) of participants.

> "All of the participants came into the CLN at different points along the continuum of experience so it was challenging to find subject matter experts to resonate with everyone. Aspen did an amazing job with that."
>
> "The Community Leadership Network gave our community foundation the tools, knowledge and inspiration to use our leadership and influence to be a powerful voice and agent for change... The expertise and knowledge of the session facilitators pushed us to think deeper, and challenged our team to be more bold and strategic in taking on community leadership work in our community."
>
> "Janet [Topolsky] was very applied and her leadership was invaluable to drive home the 'relevant' to your community foundation issues."

The breakout facilitation also received high marks with 88% of respondents reporting that the breakout facilitation was effective (evenly split between somewhat and very effective) and 6% reporting it was neither effective nor ineffective.

Two respondents said they would not keep Aspen as facilitator and two more said they would alter the facilitation in some way. More specifically, the respondents that would not keep Aspen's involvement as a key element had felt "talked down to" by the facilitators at times and felt that too many facilitators/support staff raised the expense unnecessarily.

**Curriculum**

There was general agreement that the overall agenda for the institute was effective with 70.6% of respondents saying the agenda was very effective and the other 29.4% reporting that it was somewhat effective. The CLN was organized to move at a rapid clip and was high energy making it difficult to absorb all of the information. Though the process was laborious and exhausting for a few, most found the process engaging.

The curriculum and take away materials got slightly more mixed results in that about 47% respondents felt the curriculum and take away materials were very effective while another 47% felt that they were somewhat effective and 6% reported that they were neither effective nor ineffective. While there were specific critiques of content, most were not mentioned more than twice. One element that was commonly cited was a desire for more focus on metrics and evaluation.

The community leadership framework was the element of the curriculum that respondents volunteered the most feedback on. Given that it is a cornerstone of the curriculum and the field's framing of community leadership more generally, understanding how the CLN participants viewed the value-added and weaknesses of the framework is important.

Fifty-six percent of participants felt that the community leadership framework was one of the most useful tools they took away and felt that it was an essential uniting frame for content. However, nine percent felt that it would not be an essential element to maintain and another 35% would have altered the framework in some way. Some did not understand the utility of the framework while others felt it was a useful delineation of the building blocks of community leadership but found it cumbersome.

> "We learned a very good framework for community leadership and explored ways to implement the framework with each team adapting the framework to their local community. Great opportunity to learn, develop and test out ideas and engage colleagues in a shared learning process."
>
> "The framework is a theory of change that helped communicate community leadership work to our board."
>
> "The Community Leadership Framework is very complicated and seems to be redundant in some areas, so I would like to see that updated and simplified. There are many complex strategies contained within the framework that makes that challenging, however."
>
> "The building blocks are so many and so complex that they lose effectiveness. I'd simplify."
>
> "The building block approach was a bit arcane...the process, however, did force staff/board member deliberation and debate which in turn caused Board members to get more deeply involved."

CFLeads logistics, planning and coordination were also considered effective with about 60% reporting that they were very effective, another 38% reporting that they were somewhat effective, and one respondent saying they were neither effective nor ineffective.

The between meeting conversations with CFLeads and Aspen received the most variation in response and the most negative response with approximately 32% finding them very effective, 50% considering them somewhat effective, and about 12% finding them neither effective nor

ineffective.  Between meeting work plans were considered very effective by 30% of respondents, somewhat effective by about 49% of respondents, and neither effective nor ineffective by 12%.

**Time, Space and Applied learning**
Participants valued that the process was centered on a hands on project that could be addressed over the course of the CLN.  Seventy seven percent felt that identifying and working on a "Learning for Action Question" was an essential element to maintain, though 24% felt that this element should be altered in some way.

Given the pace of daily work, the time to reflect, discuss issues, and identify and develop an area of focus was an invaluable element that a majority of participants identified.  Most felt that the process gave their teams time and space to dig deep and focus on an applied issue of importance to them with their peers from other foundations and their peers from their home organization.

> "The CLN sessions helped us identify a focus and design a structure for our community leadership work."
>
> "The time commitment and intensity of work added to the value."
>
> "As we have limited time back home to work together, I always appreciate concentrated blocks of time that allow you to get to know the other members of our team"
>
> Some of the strengths of the process included, "getting to know own board/staff members; learning what and how other community foundations were doing; having specific deadlines that "forced" us to use the information."

While the time away from the day-to-day was valued by most, a few participants felt that the CLN process was too long or too much of a time commitment.  Still others felt that the timeframe was too short and there should have been another follow-up session or some other form of on-going check-in.

Seventy-eight percent agreed or strongly agreed that the between-meeting work plans facilitated progress in addressing their learning question because they served as an accountability mechanism.  The work plans were effective in large part because the organizations had to report to their peers on what they were able to achieve between meetings compared to those plans.  As one participant put it, no one wanted to look bad in front of their board members or their peers.  The work plans and homework between sessions meant that the CLN process was labor intensive.  The issue of needing more lead-time to ensure teams could schedule time to complete homework assignments also came up multiple times.  Those that tied their learning for action question to core work the foundation needed to get done (such as writing a strategic plan) felt this element was more successful.

**Applied Tools and Techniques**

In response to open-ended questions regarding strengths of the CLN process, the majority of respondents also noted that the structure of the CLN allowed for the introduction of and experimentation with new tools, models, best practices and techniques that participants found extremely valuable. More than half of the respondents noted that the CLN process offered exposure to "new" and "cutting edge" tools to improve effectiveness and introduced new leadership techniques. These tools, models and techniques were useful as applied for some but also spurred others to develop their own tools (matrix for assessing CL opportunities, new communication models, strategic planning tool, etc). The multiple meeting, 9-month CLN timeline also gave them an opportunity to try those tools, models and techniques; reflect on their practice and "re-tune" strategies; and design their own community leadership tools.

> "Having time to work with our team on our learning for action question using the cool tools and resources presented at the seminar was very helpful in making concrete progress."
>
> "The opportunity to learn about and then immediately practice using the tools was enormously helpful."

**Longer-term, Multiple Meeting Design**

As noted throughout the above sections, the multiple meeting design allowed for greater growth than can be found in a once a year conference and other more common skill development opportunities. Having to commit an entire team over an extended period of time was identified by a majority of respondents as a positive element that makes the CLN different from and more valuable than other capacity building opportunities. The design allows for deeper networking and applied learning.

> "It gave dedicated time with a team of staff and board members to better understand best practices and discuss goals and strategy for community leadership work."
>
> "A strength of this process was that you came back with the same group three times verses other conferences or skill development which is usually once."

This deep networking and applied learning, on top of the structured curriculum, was valuable in part because the participants gained a more concrete sense of the usually nebulous "what" and "why" of community leadership. Participants noted that the CLN provided understanding of the elements of community leadership, the depth and breadth of leadership work being done, the importance and benefits of community leadership, and the difficulties and limits of the leadership role. The CLN experience appears to also have helped organizations determine the kinds of leadership roles they are playing, are able to play, and would like to play. For some, simply gaining an understanding of the potential of leadership roles for community foundations was new and made the experience "powerful" and "inspiring." For others, their CLN experience justified and solidified the path their organization was on.

**Summary of Key Attributes**

The elements of the CLN design that make it a unique skill building opportunity in the community foundation field are the elements that appeared to be the most effective pieces of the process. These include: face-to-face peer learning, involvement of board <u>and</u> staff, strong and knowledgeable facilitators, outside speakers with relevant expertise, a year-long commitment, a multi-meeting format, a peer accountability element, and a focus on applied learning and the introduction of useful tools. It is likely that these elements, which were called out as individually strong, are strongest when used in combination with one another, as they build on one another.

**IMPLICATIONS FOR FUTURE COMMUNITY LEADERSHIP NETWORKS**

A primary purpose of the community leadership network process is to build a community of practitioners that speak a common language and share a set of values and ideas around what it means to lead as a community foundation.  The CLN is intended to provide a forum for reciprocal, continuous learning and a system of accountability that does not otherwise exist in the philanthropic field.  In essence, the process is about discovering, educating, enabling, and empowering and creating a lasting learning network.  The following sections summarize the strengths of the CLNs and offers suggestions, based on the survey data, on how to fill gaps, further the CLN's reach and deepen impact.

**Understanding of Community Leadership and Will to Practice**
Understanding and will are foundational to more tangible organizational change, as they help to create an organizational culture that can support community leadership work.  The CLNs provided the participants with a greater understanding of the spectrum of community leadership capacity and experience that exists in the community foundation field.  Participants are better able to identify their own strengths and weaknesses and the CLN provided resources that they can and have drawn on to improve their community leadership practice.  The CLNs were successful in increasing or helping to sustain participants will to do community leadership work by providing examples of successes and providing greater definition of community leadership.  Those that were relatively new to the work grew more comfortable taking a more intentional leadership orientation and more experienced foundations were encouraged that they were on the right path.

Key CLN Features:
- Sessions that provide understanding of the elements of community leadership.  For many of the community foundations, a clearer definition and understanding of what community leadership is, how it differs from a traditional approach and what the benefits and challenges are was needed to get board and staff buy-in and/or to help some organizations take a more intentional approach to the community leadership work they were already doing.

- A peer learning and presentation structure that provides community foundations with examples of how others have implemented community leadership initiatives, and what the specific benefits and challenges of community leadership work are similarly provides in depth insight into the approach.

- Applied elements (Learning for Action Question and hands-on tools) make the CLN both a unique and useful process.  The sessions make real how the work can be done and why – there is not much that is more compelling.

- Learning that is as much individual as it is organizational. The CLN experience appears to be an individual one as much as it is an organizational one. Even though a few people felt that the CLN did much to build the leadership capacity of their organization, their staff and/or board members often gained in their personal capacity to contribute to the community leadership practice of their organization. The impact of building the understanding, confidence in and desire to do community leadership amongst a broader set of individuals is a strength that is tied to requiring each team to bring a diverse, representative group.

- Provided real world examples that made the ability to succeed with community leadership real.

- Structured the process so that each organization could make real progress on a community leadership issue of relevance.

Possible Ways to Strengthen:
- *Presentations reflect the traits and needs of the participants* – The first CLNs provided evidence that there is a spectrum of community leadership capacity in the participants. It would be great to ensure that the speakers represent the arc of community foundation size and resources so that everyone has an example that resonates with their assets. In addition, ensuring that speakers are relevant for foundations with differing levels community leadership experience and thus, differing needs and challenges, would help maximize impact.

- *Format for digestibility* – One consistent theme was that there was a tremendous amount of information packed in at a tight clip, making it difficult to digest all of the information in a way that provided maximum utility. Doing shorter sessions more frequently or more relaxed sessions with less frequency could help this issue. Also, on-line tools could help (see next section). In addition, some suggest streamlining or simplifying the community leadership framework but, perhaps there is a way to make it more digestible rather than simpler. The framework captures the depth and complexity of community leadership work so simplifying it is not likely the best answer.

- *Use the internet* – Given that no matter what, community foundations are going to be somewhat spread out geographically, having an on-line repository of related materials and a forum for sharing new tools and information specifically for network members, could be useful. CLN sessions could be recorded and posted on-line for review (which might also address some of the digestibility issues) and the most up to date documents and tools could be posted. There was a consistent feeling that the paperwork was overwhelming and, at times, difficult to figure out so having the most up to date assignments and hand outs available on-line could reduce confusion.

There was also a sentiment that longer-term follow-up would be valuable to hold people accountable, provide support, and ensure that success was achieved as a result of the experience.  An online portal could be a place where network participants could post questions that other network members and/or CFLeads could help trouble shoot.  In addition, a repository could be useful for evaluation of the CLN and to deepen understanding of the changing needs of the participants.

- *Look at diverse formats that can maximize reach over time* – A few people expressed concerns about the replicability of the model given the involved nature and expense of the CLN.  Because one of the expressed goals of the CLN is to create a critical mass of community foundations practicing community leadership, the ability to reach a tipping point with the model seems like it would be important.  The depth of the CLNs was evident but there may be ways to increase breadth as well.

  The majority of the participants clearly felt that the CLN was worth the investment they put in.  However, there were questions raised about how many organizations would be able (and willing) to afford to fund a CLN process.  In addition, part of the richness of the model is that it limits how many are part of the process which means that the CLN model will take longer to reach the broad public of community foundations directly.  Exploring whether it is feasible to develop a more tailored menu of options ranging from the richest and deepest CLN model to other levels or specific types of skill building should be considered.  The survey data show that there is a range of current community leadership capacity in the community foundation field and a range of associated paths appropriate for developing additional skills.  Creating and supporting on-going learning communities in a variety of forms may be a way to build the community leadership capacity of the field.

  In addition, it will be important to understand the roles and relative contributions of each of the parties involved in the design and delivery of the CLN to understand what pieces could be adjusted and who else might be able to deliver them.  A suggestion of a regional train the trainer model may be feasible, whereby Aspen and CFLeads work with regional associations and others to identify and certify local people to deliver and support regional (or issue specific CLNs), drawing on regional strengths, addressing regional issues and yet, still providing national resources that Aspen and CFLeads are tapped into and developing.  Other fields have overcome issues around developing solid content, figuring out who does the work of training, and monitoring quality and could be used as models for designing this work.

- *Emphasize importance of full participation* – There was a commonly shared belief in the importance of full commitment from the participants.  Several people mentioned that negative attitudes, a group that left early and arrived late and other signs of lack of engagement were very disruptive and rude.  There was also a sentiment that all team members should attend all sessions to provide maximum benefits from a content

standpoint and from a relationship-building standpoint.  It was suggested that emphasis be placed on having all members attend every meeting.

**Peer Learning Network**

The CLNs provided usually isolated community leadership practitioners with the opportunity to create and strengthen peer relationships that facilitate information sharing, collaboration, and learning.  The CLNs did so in ways that encourage, inspire and provide a sense of peer accountability.

Key CLN features:
- Multiple, intensive overnight meetings over the course of a year provide participants with the opportunity to get to know and bond with other community foundation practitioners, offer the opportunity to learn from one another as challenges and opportunities change over time, and provide a sense of accountability (want to show peers your organization is making progress over time).

- Face-to-face time that incorporates informal networking and socializing time, as well as, more formal formats for sharing information, tools and best practices provide a balance of relationship building and learning.

- Engaging teams that include board members, CEO and staff members was an important and unique part of the peer networking and learning process.  The CLN process facilitated the formation of intra-organizational bonds within teams as well as inter-organizational bonds across teams.  The process was useful for creating relationships within organizations, helping individual teams to get to know one another, discover a shared set of values and get on the same page with regards to community leadership goals.

Possible ways to strengthen:
- *Longer-term follow-up* (*network support and evaluation*) – Consider some method for longer-term follow-up with CLN members both to track longer-term outcomes (such as the collaboration and information exchange taking place in Minnesota) and to facilitate on-going learning, as the issues the members face shift as they gain more experience and environmental factors (policy and financial environment) change.  Perhaps a facilitator who promotes and prompts CLN members to continue to work together around specific building block issues as well as focus areas would assist community foundations deepen and broaden their belief in and practice of community leadership. CFLeads could help the networks build on-line resources for sharing tools, metrics and best practices and document the progress of the networks through periodic case studies.

- *Regional cohorts* – Ninety-two percent of respondents felt that a regional peer cohort is the more effective structure.  There was a sentiment among participants that a regional

peer cohort facilitates the creation of a more cohesive network and makes it more likely and easier for members to meet regularly and collaborate.

Regional cohorts may have a variety of benefits including lower travel costs; shared regional issues and policy foci that can lead to greater collaboration; greater understanding of one another's work that can also lead to increased collaboration and reduced competition; ability to share statewide and/or regional data that is relevant to more than one organization's work; ability to meet more regularly both within the CFLeads structured network and outside of it as the organizations are likely to attend some of the same regional events; and ability to meet after the formal network meetings are over. Regional cohorts are more likely to form connections that facilitate sustainability of the network after the heavily facilitated time period is over. If a series of regional networks existed, a higher-level network of regional network leaders could continue to share best practices nationally, perhaps in an annual or semi-annual meeting. This might help avoid insularity in regional groups and facilitate on-going progress and learning.

- *Issue-based cohorts* – These CLNs were foundational to figuring out that there is a spectrum of need. Organizations with more community leadership experience might gain more from an issue-based network with training sessions geared to more advanced needs.

As organizations build community leadership capacity, their barriers to and issues with exercising community leadership shift. While some barriers to community leadership that existed before the CLN were addressed by the CLN sessions, old, unsolved issues remained (such as having appropriate staff and dollars to devote to community leadership) and new issues with community leadership practice came into focus for the organizations (such as how to prioritize issues of most importance once an organization becomes recognized in the community as a leader). The problems and foci of those who are new to the work may be very different from those that have been doing it for a while. While the rookie community leaders can gain a lot from the more experienced organizations, the more experienced organizations are not likely to get as much value out of their rookie peers. For those more advanced in their CL practice, CFLeads/COF may also want to consider doing issue focused network development.

In addition, community foundations that are engaged in community leadership work may be interested in a CLN developed around a particular community issue/initiative (college graduation rate, job training, early childhood education, etc). Organizing a CLN around a regional group interested in collaboratively addressing a particular regional issue might be one option. Or, a CLN could be organized around organizations nationally that are trying to address the same types of (education, employment, justice, etc) issues in their communities.

- *Provide incentives for more experienced participants to mentor* – There is value in bringing community foundations of different sizes, settings and experience levels together.  The CLN participants with most experience often felt they progressed in their community leadership understanding/practice over the course of the CLN but some did not feel the gains were worth their investment in the CLNs.

  Finding a way to identify the more experienced practitioners and increase the value of the process for them might make sense.  Perhaps, if they could be identified, the more experienced members could opt out of certain presentations in exchange for more one-on-one time with advisers or other experienced community foundation practitioners on topics they are interested in.  If possible, it would be great to make the CLN a feather in their cap by doing something like treating them as case study organizations that will be publically profiled in some way post-CLN in exchange for mentoring the less experienced organizations.  Other professional fields have found ways to entice field leaders to volunteer knowledge and services and make it a mark of distinction to have done so.  The medical field and others could be looked at as potential models.

- *Involve regional grantmaker association leaders* – Fifty percent of participants felt that regional association representatives should be included in the CLN while 41% responded N/A.

  Indeed, one of the ramifications of the CLN process is that the regional association representatives that attended are taking what they learned in the CLN back to their home regions.  The two regional associations that took part in the survey – Minnesota and Indiana – are looking at how they can engage their community foundation members in longer term capacity building initiatives and are sharing the community leadership tools and techniques learned in the CLN with their members through their programming.

  The Minnesota Council on Foundations used the CLN as a model to guide development of a network focused on diversity and inclusion regionally.  Seeing the power of the CLN, they are adopting a multi-meeting, face-to-face, facilitated process to create a learning community.  The fact that the process is already being replicated in some form is compelling evidence of its impact on participants.

  The Minnesota Council on Foundation and the Indiana Grantmakers Alliance representatives both noted that most regional associations are not equipped to take on work of the intensity or scale of the CLNs on their own because they have small staffs, a broader constituency, full plates offering basic services, and are often staffed by generalists that do not have direct grantmaking or community leadership experience.  Therefore, they could serve as conduits within the field but would need to partner with others such as CFLeads to build internal capacity and/or offer something like a CLN.

- *Maximize efficiency of getting to know each other activities* – Some of the leadership story introductions were seen as inefficient and superficial because people wanted to present the positives of their work in front of their board members and peers. Developing more efficient formats will be extremely important for minimizing frustration and shaping perceptions that the process is an effective one.

- *Time with field experts* – more one-on-one or small group time to talk with certain field experts and outside community foundations was requested.

**Applied skill building**
The CLNs had a lot of applied elements that contributed to the effectiveness of the process.

Key CLN Features:
- Learning for Action Question helped community foundations identify one or more leadership issues they wanted to focus on (could be either internally or community focused). Participants were able to apply what they were learning, address challenges by getting the advice of peers, formulate actual decisions, and see resulting organizational changes.
- Tools developed by colleague foundations or consultants, such as policies, plans, position descriptions, decision-making matrices, etc. are a valuable element. The participants loved the practical, ready to apply or adapt and apply tools.

Possible Ways to Strengthen:
- *Focus on metrics* – In particular, how to thread internal and external, process and outcome evaluation throughout an organizations strategic plans and operations. Provide examples of how to use both quantitative and qualitative data, give a list of common data sources, present software that could be useful, etc. Provide examples of how to develop both pre-determined measures and more organic measures that develop through the work over time. Also consider creating a searchable metrics database where community foundations can search for how other community foundations are measuring specific types of internal change and community impact.

- *Provide more time with tool presenters* – More time was desired to have the tools explained and to give practice.

- *Focus on shifting challenges of community leadership over time* – Based on the survey responses, it is clear that the CLN participants felt that the CLN process helped address many of the challenges to practicing community leadership that their organizations faced prior to the CLN. However, there were some issues that persisted and new issues that developed over the course of the CLN.

Survey respondents were asked about the obstacles to taking on community leadership that they faced before the CLN and after the CLN. Respondents said that before the CLN they were dealing with:
- Lack of understanding of what community leadership is
- Lack of board support
- Lack of focus and intentionality around their community leadership work
- Discomfort moving away from the pure fundraise and grant model to take on a new, potentially riskier business/operational model
- Uncertainties about how the community would receive them
- Lack of time, money and staff capacity

In particular, the CLN process provided a sense of clarity around what community leadership means, affirmation of its do-ability and the benefits of its practice, and increased board and staff commitment to community leadership.

While some of the barriers to community leadership that existed before the CLN were at least partially addressed by the CLN, some of the most difficult to tackle issues were still major issues after the CLN and a whole new set of issues with community leadership practice had developed for the organizations. These include:
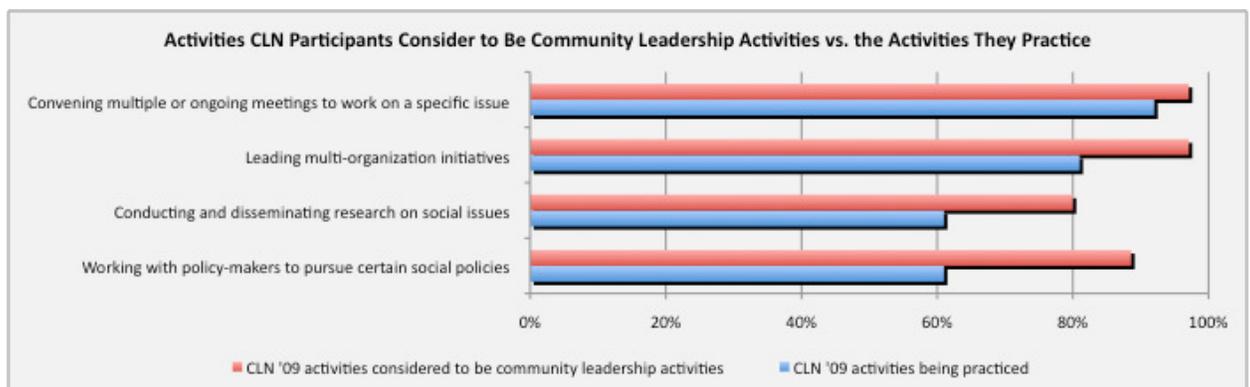- Resources (Staff time, staff expertise, money);
- Setting priorities (balancing short-term chores and long term strategy and picking issues when there is tremendous need and increasing demand from the community, as an organization becomes recognized as a leader)
- Sticking with long-term work as the role of the community foundation
- Difficulty evaluating impacts

These findings provide two insights. First, it appears that some of the barriers to and challenges of doing community leadership work shift as an organization develops internal capacity to practice community leadership. The challenges go from understanding and focusing on community leadership work to the challenges associated with the hands on practice of community leadership. Providing varied support during the CLN for organizations at different points in their community leadership development and providing on-going support and resources/tools over time may be essential for full community leadership development.
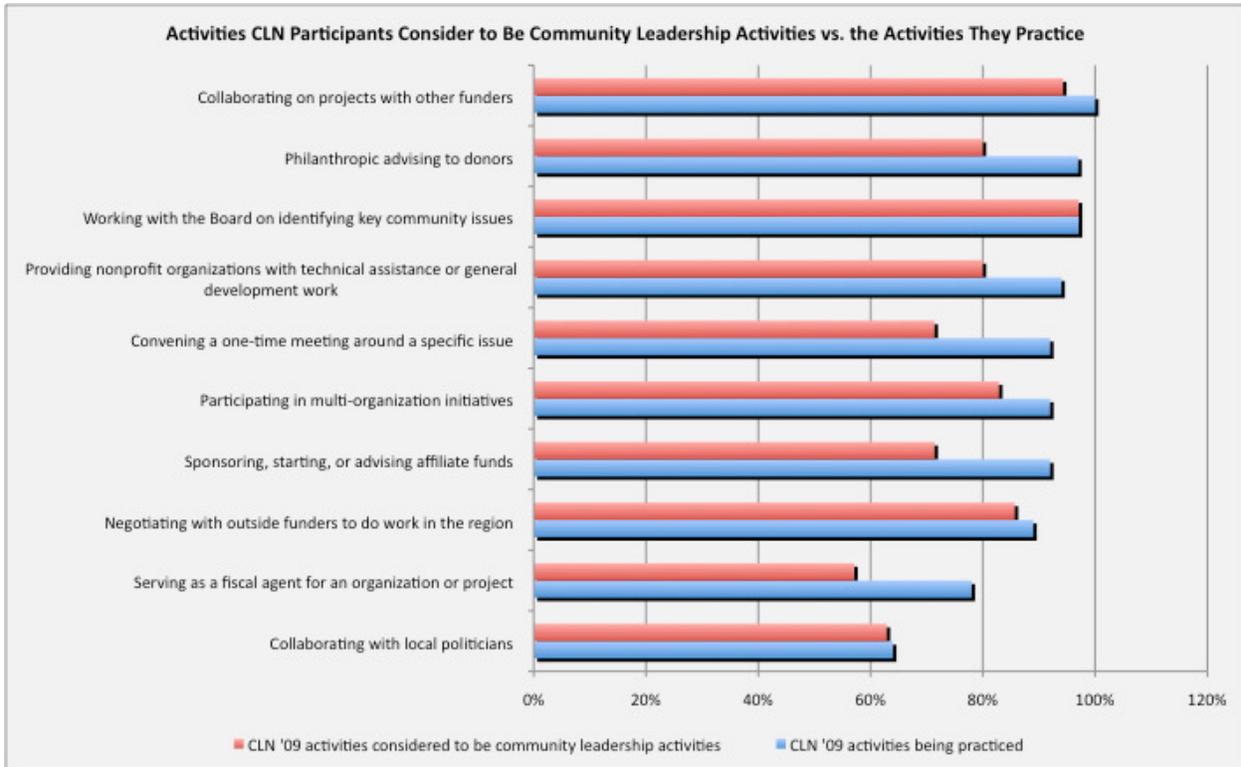
This is another indication that follow-up with CLN participants to support the network, continue to give participants a sense of accountability, and share on-going learning over time. Several of the organizations are designing processes and frameworks for setting priorities, determining length of investment, and evaluating impacts, this peer group represents a living laboratory whose discoveries should be shared.

Specifically, consider spending time on a spectrum of issues including things like:
- Setting priorities and selecting areas of investment and focus
  o Balancing more traditional activities and community leadership activities
  o Balancing short-term tasks and long term strategy
- Picking issues when there is tremendous need and increasing demand from the community, as an organization becomes recognized as a leader
- Determining what resources (staff time, staff expertise, money, time) are required to reach goals
- Sticking with long-term work through uncertainty around what roles to play/initiatives to take on

- *Consider some additional areas of applied focus* – Focus more on helping community foundations understand how to do some of the more resource intensive and difficult community leadership activities. The CLN participants were asked to identify from a list which activities they felt were community leadership activities. From the same list, they were then asked to identify which of the activities they actually practice. In looking at which community leadership activities CLN members are actually engaging in with greatest frequency, there are four areas where a higher number of people classified an activity as community leadership than were actually engaging in that activity. Those four areas were: working with policy makers to pass policies, conducting and disseminating research on social issues, leading multi-organization initiatives and convening multiple or on-going meetings to work on a specific issue. These are four areas that some community foundations are doing exceedingly well so models exist. The CLNs might want to address these areas more deeply in the future to help community foundations do the community leadership work they find more difficult. It may be best to do CLNs or on-going CLN support sessions that are specific to each activity and/or that are tailored to organizations ready to and interested in learning how to engage in that activity.



Activities CLN Participants Consider to Be Community Leadership Activities vs. the Activities They Practice

- CLN '09 activities considered to be community leadership activities
- CLN '09 activities being practiced

For the majority of the activities asked about (see chart below), CLN participants were practicing the activities and are likely to need less support in these areas.

**Activities CLN Participants Consider to Be Community Leadership Activities vs. the Activities They Practice**

| Activity | |
|---|---|
| Collaborating on projects with other funders | |
| Philanthropic advising to donors | |
| Working with the Board on identifying key community issues | |
| Providing nonprofit organizations with technical assistance or general development work | |
| Convening a one-time meeting around a specific issue | |
| Participating in multi-organization initiatives | |
| Sponsoring, starting, or advising affiliate funds | |
| Negotiating with outside funders to do work in the region | |
| Serving as a fiscal agent for an organization or project | |
| Collaborating with local politicians | |

0%    20%    40%    60%    80%    100%    120%

■ CLN '09 activities considered to be community leadership activities    ■ CLN '09 activities being practiced

In addition, CLN participants also reported that they most commonly *did NOT focus* on:
- Committee structure (57%)
- Advocacy and public policy (50%)
- Board roles and responsibilities (42%)
- Evaluating internal changes (32%)
- Board composition (32%)

Participants also indicated that they made the *least progress* on:
- Developing messages that work (23%)
- Engaging donors and other co-investors (23%)
- Measuring the impact of community leadership work (17%)
- Board engagement (15%)
- Developing a business model that supports community leadership (15%)

    These are also core areas of operational significance that represent some common barriers to taking on community leadership. For each of these, there were other participants in the same CLN that made significant progress (particularly on board engagement) that could serve as examples for those who struggled. These are areas where future CLNs might want to focus additional attention and/or provide follow-up support after the CLN.

# CONCLUSION

Overall, it is clear that the CLN process was successful in meeting its short and intermediate term goals to inspire and help participants build internal capacity to practice community leadership.  The majority of participants felt the process was well worth their time and energy and reported resulting changes to their thinking and/or actions around community leadership. Those with less community leadership experience saw greater increases in their community leadership capacity, however, those with more experience generally felt that the CLN helped them to focus and hone their thinking and strategies and confirmed that their community leadership path was a good one.

While the community level impacts of these changes cannot yet be gauged, the nature of the changes reported within the participant community foundations – to understanding and commitment, board make-up and engagement, processes, policies, grantmaking, staffing structures and job descriptions, strategy and work plans, mission statements, etc – are such that one could expect longer-term impacts.

The peer learning was unique in that it was an extended, multi-meeting, intensive, face-to-face experience focused on building the community leadership capacity of participant organizations. Particularly for the Superior CLN, the peer-learning network that was created has continued to deepen, provide on-going resources, and reap rewards in the months following the CLN.  For Alpha, the peer and expert resources provided by the CLN have also been beneficial but the spread out nature of the network has and will likely continue to hinder regular interaction.  In addition, participants in both CLNs created and strengthened bonds with other community foundation practitioners of community leadership and strengthened the bonds and shared values and vision around community leadership with co-workers and board members from their own organizations.

The survey feedback and reported impacts speak to the quality of the process, content and facilitation.  In addition, the survey revealed ways that the process might be strengthened and organized for greater impact for organizations with a spectrum of community leadership capacity.  Finally, the evaluation provided evidence that longer-term follow-up and support of the networks would be welcomed by participants and would likely help to build the network, embed community leadership in community foundations, push the field, amplify the flow of resources, and provide a view into the long term impact of the CLN process.

# ACKNOWLEDGEMENTS