

Family Economic Security Action Alliance Evaluation

Prepared for CFLeads
By Marisa Bueno Strategy Consulting

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EXECUTIVE SUMMARY

Introduction

This report presents the major findings of an evaluation on the effectiveness of the 2017-18 CFLeads Family Economic Security Action Alliance (FES Action Alliance). The program, offered by CFLeads, enlisted the Federal Reserve Bank of Boston and The Democracy Collaborative as content partners and was supported by the Charles Stewart Mott Foundation and W.K. Kellogg Foundation. The FES Action Alliance brought together six community foundations from around the country to increase each team's knowledge of family economic security, build peer connections, seed potential collaborations, and make tangible progress toward addressing a family economic security challenge in the participants' respective communities. Staff from the Federal Reserve Bank of Boston and The Democracy Collaborative served as coaches for the individual teams, content providers, and facilitators along with CFLeads staff. This summary highlights the strongest findings from surveys and interviews used to evaluate the FES Action Alliance process and its outcomes.

FES Action Alliance Program Design

The FES Action Alliance took place over the course of 2017 with three, two-day in-person meetings (in February, June, and October) held in different locations across the country (Dallas, Cleveland, and San Francisco). The meetings were attended by teams of community foundation representatives, including the CEO, at least one board member, at least one staff person, and in some cases, a representative from a community partner organization. The FES Action Alliance provided instruction, peer support, expert advising, and professional facilitation to two learning groups. The first group was for participating foundations that are using a community wealth building (CWB) approach to address a family economic security challenge, and the second group was for participating foundations that are using the development of children's savings account (CSA) programs to address family economic security challenges. The use of two learning groups made the FES Action Alliance unique in the constellation of capacity-building peer networks offered by CFLeads.

Rather than broadly focusing on community leadership capacity, the FES Action Alliance was an opportunity to test the efficacy of combining a peer learning model with expert content support to help foundations develop capacity to address family economic security challenges. The core elements of the CFLeads peer learning model were implemented for the FES Action Alliance and many of the findings in this report are consistent with the success of past CFLeads peer leadership networks. In addition, the expert content partners added a new set of strengths to the process. Ways to improve critical elements of the process and maximize the benefits of expert engagement are also explored.

Evaluation Findings

Satisfaction with the FES Action Alliance Process

Overall, survey and interview results indicate that participants found the FES Action Alliance to be a valuable and unique learning opportunity that resulted in tangible, positive changes in

their foundations' capacity to implement community wealth building and/or child savings account programs.

- One hundred percent (100%) of survey participants rated the FES Action Alliance overall experience as excellent (20%), very good (60%), or good (20%). None of the participants rated it as fair or poor.
- Approximately 86% of survey participants agreed (53%) or strongly agreed (33%) that “the FES Action Alliance, as currently designed, is an effective strategy for helping community foundations and their partners (at different points in their FES program development) to build capacity to practice effective family economic security work.”
- One hundred percent (100%) of survey participants agreed (53%) or strongly agreed (47%) that “processes like the FES Action Alliance would be a worthwhile, ongoing investment for the community foundation field.”
- Ninety-three percent (93%) of survey participants reported that they (as an individual) would take part in the FES Action Alliance again knowing what they now know and 100% said that their team benefitted from the experience in substantial ways and would participate again knowing what they now know. Interestingly, the one person who said they would not participate again is going to participate in the CFLeads-led peer network that developed from the FES Action Alliance.

The FES Action Alliance Process in the Words of Participants

[The FES Action Alliance] helped us focus our team on framing our aspirations, opportunities, challenges and questions, as well as giving us the structure, tools and support to move forward.

The meetings were great incubators of ideas and self-awareness. Every contact enlarges what we can do and what the field can do.

Meeting the Goals of the FES Action Alliance

Overall, the data consistently show that the FES Action Alliance process was highly successful in meeting its goals to (a) strengthen and advance knowledge and understanding of family economic security approaches, increase staff and board commitment to their CWB/CSA programs, and broaden and reinforce perspectives on potential impacts of the work; (b) help foundations plan and implement CWB and CSA programs by building organizational competency to practice community leadership; (c) overcome barriers to their CWB and CSA work; (d) build a fruitful cross-organizational peer network to improve the practice of participating foundations with a wide range of starting capacity.

Building Knowledge of and Commitment to Community Economic Development

- Eighty-six percent (86%) of participants reported that the FES Action Alliance was effective (50%) or very effective (36%) at increasing understanding of what community economic development means for their community. Eighty-six percent (86%) of participants also reported that the FES Action Alliance was effective (43%) or very

effective (43%) at increasing knowledge of family economic security. The process was able to:

- Grow participants' conceptual and tactical knowledge of community wealth building.
 - Give participants understanding of the latest research findings and what is happening in the FES and CSA fields.
 - Provide clarity around best practices, including the principle that no matter what the model, to be effective CSA work has to be high touch and deeply rooted in community.
 - *Show* participants what other communities are currently doing.
 - Give insight into what has already been done such that relative benefits and drawbacks could be shared, reducing inefficient and ineffective work.
 - Provide consultant and peer support to help improve programs and gain detailed information as needed.
- Participants from all six organizations reported that the FES action Alliance was effective at reaffirming and/or strengthening board, partner and staff commitment to growing investment in CWB/CSA work, and reinforcing beliefs around the effectiveness of CWB/CSA approaches. This commitment is demonstrated by investments made during and after the FES Action Alliance.
 - Though CWB/CSA work is still a relatively new and small portion of the work participating foundations do, 78% of respondents said that they strongly agreed (57%) or agreed (21%) that CWB/CSA work would guide staff and board development.
 - Ultimately, participants demonstrated their belief in the efficacy of community economic development (CWBs and/or CSAs) with 100% agreeing (13%) or strongly agreeing (87%) that engaging in CWB/CSA work positions their organization to have a greater impact in their community.
 - Overall, teams noted that without the interactions with peers and experts provided by the FES Action Alliance, many realizations would have taken a lot longer to reach through trial and error.

Building Organizational Competency to Practice Community Leadership

The teams were asked about community leadership activities they were engaged in through their community wealth building/CSA work before and after the FES Action Alliance. The activity area that saw the greatest shift in emphasis was "working to influence policy." Only one foundation reported that they were actively working on influencing policy related to their CWB/CSA efforts prior to the FES Action Alliance. After the FES process, five of the organizations reported that this was an area of focus. This is significant because policy engagement is a critical community leadership competency that many community foundations struggle with and CFLeads is focused on helping to develop.

Overcoming Past and Present Barriers

Respondents from a majority of the foundations noted that the FES Action Alliance helped their foundations address two of the most prominent challenges they face in their CWB/CSA:

- Lack of structures, policies, and processes in place to support CWB/CSA work
- Lack of staff knowledge about community economic development

Developing a Cross-Organizational Peer Resource Network

Another primary goal of the FES Action Alliance was to create a peer network that could contribute to learning over time and serve as an on-going resource. Survey respondents from all participating foundations reported that the FES Action Alliance achieved related goals.

- Survey respondents from all six community foundations reported that the FES Action Alliance process had strengthened the peer network that they can draw upon as a long-term resource. Participants from five of the six foundations said that in the six months since the final FES meeting they had been in contact with peers from another FES Action Alliance community by phone, e-mail, or in person. The sixth foundation planned to reach out to peers in the future.
- Ninety-three percent (93%) of respondents reported that the FES Action Alliance was very effective (67%) or effective (26%) at helping the teams get to know other foundations/communities, their FES challenges, and their strengths and aspirations.
- Eighty-seven percent (87%) of respondents reported that the FES process was very effective (67%) or effective (20%) at providing valuable ideas and advice from peers on specific challenges their team was facing.
- Eighty-five percent (85%) of respondents said that the FES process was very effective (54%) or effective (31%) at seeding potential collaboration with peers and/or resource organizations.

Impact of the FES Action Alliance Process

A majority of FES Action Alliance participants reported capacity building in-line with the goals of the FES Action Alliance and their organizational goals. Within six months of completing the FES Action Alliance all participating foundations made tangible changes to staffing, finances, programming, and/or processes, and also made advancements in planning and/or implementation of their CWB/CSA programs.

Growth in Capacity to Practice CWB/CSA Work

- Seventy-four percent (74%) of survey participants noted that the FES Action Alliance process was effective (47%) or very effective (27%) at helping them achieve the family economic security goals they wanted to achieve through the Action Alliance.
- Sixty-nine percent (69%) of survey respondents, representing four of the six teams, felt that their organization's capacity to support effective CWB/CSA work was stronger after the FES Action Alliance process. The other 31% felt that their organizational capacity was equally strong at the beginning and end of the process and they were poised to strengthen programs further after the FES Action Alliance.
- Participants consistently reported significant positive growth in time spent on CWB/CSA programs, strategic planning for CWB/CSA programs, and dollars devoted to developing and implementing CWB/CSA programs, as well as changes in practice and structural capacity.

Tangible Resource Changes

- Only six months after the conclusion of the FES Action Alliance, 100% of individual FES Action Alliance survey participants indicated that their foundation had increased or was in the process of increasing resources (staff time and/or finances) devoted to growing CWB/CSA work in their organizations.
- One hundred percent (100%) of survey participants also said that those resource changes were positively influenced by their involvement in the FES Action Alliance process. The primary area of resource investment was in staffing—either increasing existing staff members’ time or hiring additional staff.

Rating Progress Made as a Result of FES Action Alliance Participation

- Using a scaled rubric, participants were asked to self-assess the stage of development of their CWB/CSA program before and after involvement with the FES Action Alliance. Participants reported measurable improvements in their programs from before they began the FES process to the end of the process and reported continued growth in the six months after the final meeting.
 - On average, FES Action Alliance participants noted an approximately 3.1 point increase on a 10-point scale from the beginning of the Action Alliance to six months after the last FES meeting. This change indicates major growth in programs over the duration of and in the six months after the FES Action Alliance.
 - In addition, the self-assessments indicate that partnering with expert content providers allowed CFLeads to help community foundations with a wider range of starting capacity to plan for and implement new and complex initiatives and was particularly beneficial for those that began the FES Action Alliance process with new or less developed programs.
- Participants felt that the FES action Alliance was responsible for pushing progress that otherwise would not have happened or would not have happened on the same timeline.
- Ninety-three percent (93%) said that the FES Action Alliance was effective (64%) or very effective (29%) at meeting the objective of helping teams make progress on their FES challenge.
- Participants credited the process with advancing their program. Eighty-seven percent (87%) of survey participants agreed that although their team was already making progress prior to the FES Action Alliance, the process helped to advance their program. Seven percent (7%) felt their organization would not have made any progress without the FES Action Alliance.

Overall, the data consistently show that the FES Action Alliance process was highly successful at strengthening and advancing knowledge of family economic security approaches, developing CWB and CSA programs, and improving practice of participating foundations with a wide range of starting capacity. Ultimately, every foundation reported changes that were directly tied to their learning in the FES Action Alliance.

The FES Action Alliance Process in the Words of Participants

CFLeads has an engagement methodology/approach that served people well. I believe it was most effective at pushing me to move my projects along faster because of their time frame.

The most effective things for me were opportunities to learn from colleagues doing similar work and exploiting the contacts of CFLeads that accelerated our work.

Expert assistance and guidance was invaluable. The experience sharpened the team's expectations and program goals where they had been unclear and unspecified. [It took us] from desire, to understanding, to knowing, to confidence and then action.

Key Elements that Contribute to the Effectiveness of the FES Action Alliance Process

Understanding the elements that were most essential to the effectiveness of the FES Action Alliance process is essential to help CFLeads continuously improve their peer learning processes. Several elements of the FES Action Alliance had clear value for participants including: face-to-face time with peers; expert coaching and guidance; and applied learning through a deliberate, responsive learning process. While each element is individually important, the combination of learning, planning, acting, coaching, and experiencing progress over time worked synergistically to impact participating organizations. The structure of the FES Action Alliance was largely effective and also revealed several potential ways to deepen peer learning in future networks.

Lessons from the FES Action Alliance Process

What Does Readiness for Peer Learning Processes Like the FES Action Alliance Involve?

Participants in the FES Action Alliance (foundation teams and expert content partners) were asked what they would recommend having in place within their organization in order to gain the most from peer networks like the FES Action Alliance.

- The CEO, board, and a set of critical stakeholders and partners are committed to the process.
- The organization has enough relevant background and experience in family economic security to fully commit to developing a program.
- Staff are assigned to design and implement the chosen program and the team has a strong leader to push ideas from conception to strategy to implementation.
- The team has evidence of where their FES strategy/work currently stands and what resources they can draw on/are utilizing (whether they are only starting out or are deep into the work).
- For those beginning to develop a CWB/CSA approach, taking a broad exploratory perspective was important.
- The community foundation needs to have a clear set of goals coming into the process.

Pros and Cons of a Peer Process with Two Parallel Peer Learning Groups

For the FES Action Alliance, workshops were developed with the two peer learning groups in mind. Each group had its own focus, CWB and CSA, and each team had their own context and challenges to work within. The CFLeads-led planning team strove to provide a level of shared understanding and conceptualization of community wealth building practices amongst the groups. With teams working at different stages of program development in different focus areas, providing a common experience of value to all was, at times, challenging.

There were positives to having two tracks of focus within the FES Action Alliance. CWB-focused teams said that learning about CSAs was valuable, as they would be more likely to look into it in the future as a potential avenue of family economic security work. Some felt that the relationships created through the FES Action Alliance would also make it more likely that they would broaden their community economic development work to include a CSA program. Overlapping learning sessions also helped the CSA teams with the community economic development work they were already doing or were already planning, outside of the context of the FES Action Alliance.

However, there was a strong, overarching sense that the process was not successful at uniting the streams of the two learning groups and would have been better off not trying to link them. Given the limited time, each peer learning group would have been better off staying focused rather than trying to blend or adequately cover both areas. The other drawback of doing two largely distinct peer learning groups within one cohort was the smaller number of foundations in each group providing fewer peers to compare programs with and get help from (compared to other CFLeads peer learning networks).

Team Make-Up—Board, CEO, and Community Partner Participation Is Important

Teams varied in the number of people they brought to the FES Action Alliance meetings. While those that had a dedicated core team (without board representation and sometimes without CEO representation) felt that they were effective, those that brought larger, more diverse teams found enormous value in doing so. In fact, these larger teams expressed that they wished that they could have included additional community partners and residents, cross-sector stakeholders, board members and non-programmatic staff because they believed that the process would have helped them reach a shared vision more quickly. Groups with anchor institution partner participation were able to return to their communities with a shared knowledge base and plan. Emphasizing the benefits of diverse team make-up should continue to be a critical part of planning and recruitment of participants for CFLeads.

Consistent Facilitation and Coaching Could Further Strengthen the Process

Cohesive facilitation across meetings would strengthen the process. In addition, ensuring that facilitation is provided by someone other than the content experts during peer advising sessions would be helpful. This would allow content experts to listen in, gain valuable information to circle back to in coaching sessions, and participate in a limited way in peer advising while ensuring that peer feedback is emphasized. Having a consistent set of support staff at each meeting would also be useful if possible. In addition, given the diversity of

participant communities and projects, deeper check-ins and in-person visits would have been helpful (though possibly prohibitively expensive).

Higher Touch Between Meetings Could Yield Benefits

Participants recognized the power of accountability and momentum created by the process. Many felt that creating a stronger check-in process with more conversation/coaching between meetings would have further strengthened this element and in some cases, could have made the homework feel more relevant.

Opportunities for Data Collection and Research Are Abundant and Help with Data Collection, Evaluation and Research Is Wanted

When participants were asked about areas of focus where they would have liked further help, seventy-nine percent (79%) of the participants in the FES Action Alliance were interested in further sessions tailored to their organization's needs around data collection and impact measurement.

Duration of the FES Action Alliance—Extending Peer Network Support Could Be Useful

Participants felt that the process was too short for all that the FES Action Alliance was trying to accomplish, especially for developing deep connections with peers (including members of the cohort and visiting experts). Most wanted the opportunity for more, as evidenced by the CSA track participants continuing for a second year with CFLeads. In addition, a few foundations have joined other networks because they found the peer interaction in the FES Action Alliance so valuable that they wanted more. Participants noted that at a minimum four sessions throughout the year would have been better.

The main body of the report includes a final section on specific implications for both process and content for CFLeads' continuing 2018-19 CSA peer learning network. Those recommendations can be found beginning on page **Error! Bookmark not defined..**