Community Leadership Framework Toolbox

A tool for community foundations for using the
Framework for Community Leadership by a Community Foundation
DECEMBER 2009

CF LEADS
Community Foundations
Leading Change

COUNCIL on FOUNDATIONS

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Using This Toolbox

The purpose of this toolbox is to make the *Framework for Community Leadership by a Community Foundation* user-friendly and accessible for community foundation staff and boards as they consider their foundations' role in building stronger communities. Included are several tools and instructions for using each tool. Each tool is attached to this PDF document in MS Word, so that community foundations can complete, save, refer to and update.

A web conference presentation about the toolbox can be viewed at http://www.cfleads.org/resources/webinars/2009_webinar4/index.php

We invite your feedback. Please send your comments about this Toolbox to dsilke@cfleads.org

Introduction to Community Leadership and Toolbox Overview

Why the focus on Community Leadership?

Ever since the day in 1914 when the Cleveland Foundation first opened its doors, community leadership has been part and parcel of the work of community foundations. In fact, creating the community foundation model in the first place was a true exercise of community leadership – an amazing experiment in how people in a community could organize and perpetuate local resources in new ways to help take care of their community.

Almost a century later, the number of community foundations in the United States has grown from that first one to more than 700, and the community foundation movement has gone worldwide. Fifteen years ago, few if any community foundations existed outside the United States and Canada. Today, there are more community foundations outside North America than there are inside. And community foundations elsewhere are organizing in their own new ways to take care of their communities.

Recent decades have also witnessed a pendulum swing in the focus of U.S. community foundations. Late in the 20th century – especially during the 1980s and 1990s – many U.S. community foundations concentrated on building stronger relationships with leading donors in their communities, and providing services to address the community philanthropic interests of those donors. This emphasis positioned community foundations as a value-adding alternative to placing a donor's assets with charitable gift funds held by financial institutions. The community foundation field learned a lot and gained a great deal from this concentrated effort.

In 2005, however, a study about the future of U.S. community foundations encouraged the field to stop, look, and listen. This provocative examination of the community foundation field and its future – *On the Brink of New Promise: The Future of U.S. Community Foundations* – challenged the field to think anew, and to shift beyond its recent focus on the accumulation and management of donors' financial assets.[1] It examined the relevance and competitive positioning of a financial-asset-focused view of the field in light of growing competition for that ground from commercial gift funds and a range of other community philanthropy organizations, including United Ways, giving federations, identity-based funds, giving circles, hometown associations and healthcare conversation foundations.

On the Brink concluded that the future viability of community foundation field is closely tied to community foundations' broad and deep knowledge of their communities, and their effectiveness in helping lead the way on significant issues in their communities. In effect, it encouraged the U.S community foundation field to look back to its origins to find its future, to reattach the field to its very earliest roots -- a burning commitment not just to do good things in the community, but to be a *catalyzing force* that takes on the critical issues that will fundamentally improve our communities.

On the Brink of New Promise created a "buzz" in the field. This new attention – some say new movement – on community leadership in the community foundation field influenced many foundations to begin to ask themselves new questions about how they can take on or improve their community leadership roles. Many community foundations began looking for tools and resources to help them better understand their roles in community leadership and how they can improve their practice, but discovered a real scarcity of relevant resources. ***There wasn't even a generally accepted definition of what "community leadership" means in the context of a community foundation***.

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[1] Lucy Bernholz, Katherine Fulton and Gabriel Kasper. *On the Brink of New Promise: The Future of U.S. Community Foundations.* Blueprint Research & Design, Inc. and Monitor Company Group, LLP: 2005.

So what *is* Community Leadership by a Community Foundation?

In 2007 and 2008, the Community Foundations Leadership Team of the Council on Foundations, with support from several national foundations, commissioned the national nonprofit CFLeads to convene a National Task Force on Community Leadership (NTF). The Task Force, composed of more than three dozen community foundation and philanthropy leaders, was deeply interested in improving the practice of community leadership both in individual foundations and in the field as a whole.[2] The Task Force took on two major assignments: First, define community leadership. Then build a framework that can help community foundations better understand and practice it.

The National Task Force on Community Leadership defined community leadership in a positive statement that declares what is true when a community foundation is acting as a community leader:

> *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.*

To better understand what this definition means, it helps to break it down part-by-part.

The community foundation…

is a catalyzing force…
This acknowledges that the community foundation *always* takes a part that makes something happen – but it rarely acts in isolation. It acts in concert with others, sometimes taking or sharing the lead, sometimes following another leader with key assistance, sometimes paving the way for new leaders.

that creates a better future for all…
This acknowledges that the community foundation's constituency is the entire community. Every issue, every cause it embraces, every activity it engages in, has some connection to the greater good of producing benefits for all, including those who are marginalized or left out of society.

by addressing the community's most critical or persistent challenges…
This acknowledges that the community foundation can be counted on to address the things that matter the most in the community and that it doesn't shy away from something because it's too hard or "it has always been that way."

inclusively uniting people, institutions, and resources…
This acknowledges how the community foundation goes about its business in the open and how it ensures broad participation. It also recognizes that the community foundation is particularly well suited to assemble, leverage and deploy a wide range of resources.

and producing significant, widely shared and lasting results.
This acknowledges that the community foundation looks beyond quick fixes and innovative pilot projects, and that it has the staying power to reach long-term results that have positive impact across the community's spectrum of people, place and organization.

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[2] See Appendix I for National Task Force membership.

Overall, this definition acknowledges that community leadership is not something "apart" from what many community foundations do or have been doing. Certainly, plenty of community foundations have either chosen or found themselves in a central role of coordinating or leading the way when their communities have experienced a particular challenge or enjoyed some new opportunity.

And this definition does not suggest that community leadership is something that community foundations do *besides* their basic grantmaking and donor services. Rather, it makes clear that those services are critical parts of community leadership.

But the definition does signal that community foundations that wish to pursue a community leadership mission have a clear "Job One" priority. They pay most attention to whether they are organizing the work they do – whether it is grantmaking, donor and asset development, convening, investing, leveraging -- to produce significant positive results for people and the community focused on the issues and opportunities that will make the *most* difference today and for the future.

In summary, community leadership has always existed in the field to some extent. But it has varied in emphasis over the decades, and by preference of individual community foundations. For some community foundations today, community leadership is a new way of thinking and acting. For most, community leadership is about systematically getting better at what has always been one of the most important aspects of our work.

Why us? Shouldn't or couldn't some other organization be doing this?

Community foundations typically are uniquely positioned to take on critical community issues and significant community opportunities. In many places, no other organization is as well suited or can be as effective as a community foundation to play certain roles that are pivotal to making things happen. Your colleagues in the community foundation field have found several reasons they might emerge as the right organization to take on certain community leadership challenges:

- *Community foundations are nonpartisan.* People often trust community foundations to take on issues because they feel community foundations will listen to and weigh all the relevant interests and viewpoints in a fair way. That's because the board, staff, donors, grantees and volunteers of a strong and well constructed community foundation reflect just about every side on most issues.

- *Community foundations have wide-ranging relationships.* Donor advisors and boards provide community foundations with wide access to the business and traditional leaders in the community. Through their grantee relationships, community foundations build connections across the nonprofit, education and government sectors. Board members are widely respected community citizens with their own substantial range of contacts and relationships. In publicizing grants, giving opportunities and community issues, community foundations often establish credibility with the media. Few – if any – other community organizations can claim as wide a range of strong positive relationships.

- *Community foundations have convening power.* The combination of reputation, relationships and resources gives community foundations the power to serve as trusted conveners on almost any community issue – no matter how complex or fractious.

- *Community foundations have flexible resources.* Where else can a community find as wide a range of resources it needs to act together on a community issue or opportunity? Community foundations have resources – or can more easily assemble resources – that are flexible enough to bring to bear where and when needed. Most government resources are tied up in categorical funding streams, constrained by narrow enabling legislation, or take a long time to access. Nonprofits scrambling for

resources to meet day-to-day needs seldom have anything to spare, and are often focused only one issue or constrained to certain activities by their funding agreements. Community foundations – even those with very small unrestricted endowments -- usually have some flexibility to allocate or redirect funds or to know which donor advisors they can count on to help when needed.

- *Community foundations can flex their jurisdiction and tools.* In many places, community foundations are often the *only* institution that spans the many jurisdictions and issues in a natural economic and cultural region. Indeed, in some places, community foundations become *the* key player that pulls the region together, sometimes by collaborating with neighboring community foundations. And because they match resources with community opportunities, community foundations can handle all the sides of a program transaction as necessary -- from convening to study a problem, to establishing funding streams to address it, to leveraging in resource partners (outside foundations, government, business), to identifying and building the capacity of organizations to carry out the work, to offering fiscal agency to the effort, or even to operating programs themselves.

- *Community foundations have staying power.* Elected leaders come and go, nonprofits and businesses are born and die, but community foundations are designed from the ground up to be permanent community resources. This gives community foundations staying power – and staying power is often essential when taking on important issues or capitalizing on major opportunities. Often the reason a problem persists in the first place is that no one has taken a long-term view!

What does the Community Leadership Framework Toolbox offer?

The National Task Force on Community Leadership started by defining community leadership. Their next step was to develop a **Framework for Leadership by a Community Foundation**. The **Framework** starts from the definition, and constructs a detailed outline of "building blocks" that community foundations can strengthen if they want to get better at community leadership.

This **Community Leadership Framework Toolbox** is the next step.   It has been developed as self-help for individual community foundations as they examine and strengthen their own community foundation's community leadership role and capacity.

We mentioned it earlier: For some community foundations, community leadership is a new way of thinking and acting. For most, community leadership is about systematically getting better at what has always been one of the most important aspects of our work.

This **Community Leadership Framework Toolbox** is designed with all these starting places in mind. It will help those new to community leadership begin the process of thinking about how it applies to their foundation's work, and will help the "old-hands" who have always exercised their foundation's community leadership to be more thoughtful and effective..

The point is that *anyone* can do it. Regardless of its age, location, history or size, a community foundation can enter community leadership work and get better at it. In fact, it is best to approach community leadership with a "practice makes perfect" mindset.

This **Toolbox** can help your community foundation:

- *Understand community leadership – and your foundation's will to take on community leadership*

- *Conduct an inventory and analysis of your foundation's community leadership status today, and determine which building blocks you want or need to strengthen*

- *Plan specific new community leadership initiatives – and determine what capacities you need to develop or strengthen to successfully take them on*

- *Collect and tell the stories of your community leadership efforts in a way that both prepares you to effectively communicate them to stakeholders and the media and helps you do better with future community leadership initiatives*

- *Assess and measure your community leadership initiatives – looking at both the community leadership initiatives' progress and outcomes, and the effects that your work has had on your foundation.*

This **Toolbox** is organized into five easy tool pieces:

- **Understanding Community Leadership.** This tool offers a series of readings and discussion questions that you can use with your foundation's board, staff or partners to better understand community leadership, and to consider your own community leadership role and will to do more.

- **Framework for Community Leadership by a Community Foundation.** Once your foundation determines it wants to get better at community leadership, you can use this **Framework** as touchstone for strengthening your community leadership capacity and results. The remaining tools in this Toolbox are organized around the Framework and its building blocks to help community foundations think about and improve their work.

- **Community Leadership Framework Status Assessment Tool (CL SAT**). This tool is designed to help you gauge your community foundation's community leadership strengths at a particular point in time, to identify the priority community leadership capacities that you want to strengthen, and to set you on a path toward doing so.

- **Community Leadership Action Planner Tool.** This tool can help your foundation plan how it will either work on a specific community leadership issue or strengthen a particular **Community Leadership Framework** building block – or both – within the time frame of one year or less.

- **Community Leadership Story Tool.**   This tool will help you profile, learn from and sharpen one of your foundation's **specific** community leadership efforts.

Who developed this Community Leadership Toolbox?

This **Toolbox** was developed by CFLeads and the Aspen Institute Community Strategies Group for the Community Foundations Leadership Team of the Council on Foundations.

Please share your stories, critiques, applications, adaptations and ideas with us.   Help us understand where we're on target and where we're missing the mark.

Please send your feedback and ideas to:

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The National Task Force on Community Leadership

The National Task Force on Community Leadership (NTF) met over ten-month period beginning in September 2007 to determine what is needed to make community leadership a defining characteristic of community foundations and a core competency of the field. The National Task Force was staffed by CFLeads and the Aspen Institute Community Strategies Group. The work of the Task Force was supported by the Council on Foundations Community Foundations Leadership Team, with generous funding from the Ford Foundation, the Charles Stewart Mott Foundation and the Annie E. Casey Foundation.

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Understanding Community Leadership

Purpose	**Understanding Community Leadership** offers your foundation a few ways to learn about and better understand community leadership, and to consider your own community leadership role and will to do more.
Uses	The materials and discussion questions referenced or provided here can be used to help: ▪ Open a discussion with your community foundation's board or staff about what community leadership is and why it has emerged as an important direction for community foundations. ▪ "See" what community leadership looks like, as practiced by a range of community foundations. ▪ Surface the concerns about and energy for taking on a greater community leadership role in your foundation. ▪ Determine your next steps.

Instructions		
	Set a Discussion Process	First, design the process in which you consider community leadership. Determine: ▪ ***Who will lead?*** Determine one or two people within the foundation who will take leadership in making this examination and discussion happen. If needed or desired, secure outside facilitation assistance to make sure the discussion is deep and hearty. ▪ ***Who will participate?*** Work with a Community Leadership Exploration Group or team to deepen your understanding of community leadership. For example, you might start with a committee of the board, with a special ad hoc board and staff group, or with the entire board at a retreat. ▪ ***When?*** It's best to set a particular time period during which you will conduct this special "study" of community leadership and make a determination about your next steps. Depending on the context and what you connect it to (see next point), that time period might be two weeks or one year! ▪ ***Connected to what other action?*** Doing this examination will have more impact if it is connected to making some decisions about or producing some results for the community foundation – for example, as part of annual goal-setting, a board direction-setting retreat, or as preface to a significant strategic planning process.
	Select	Have the process leaders choose a set of materials – readings, Power Points or speakers – that you will use with the group. Your choices include: ▪ ***Understanding Community Leadership: A List of Ready Resources***. This list (on the next page) offers a selection of readings and Power Points from which you can pick and choose. ▪ ***Community Foundation Colleagues.*** Ask a community foundation board or staff member from another community foundation that has taken on significant community leadership to come and explain why, how, and with what results. You may have someone in mind. If not, you can ask your state's association of foundations, if you have one, who they would recommend. Or you can ask the Council on Foundations or a regional organization that does a lot of work with community foundations for their recommendation. *Process Pointer* ➲ *You might suggest that any speaker use the Community Leadership Story Tool to profile one or two of their community leadership initiatives.*
	Gather and Have at It!	Assemble your group or team according to your plan – in person, on the phone, or in an electronic meeting – to discuss community leadership. This might be a one-time event or a series of sessions. Whichever it is, make sure you have enough time to have a meaty discussion – and a good set of questions that will generate honest and frank exchange. *Process Pointers* ➲ *If readings are part of your process, send them to participants ahead of time, along with some "homework" questions for them to come to your discussion ready to answer.* ➲ *Your discussion questions will vary– based on your community foundation's starting point with community leadership, and your reason for having the discussion now. See a set of potential discussion questions on the Page 3 of these instructions.*

Understanding Community Leadership: A List of Ready Resources

Here is a list of available resources that you can use to launch a discussion of and exploration of community leadership for your foundation.
Pick and choose from these to generate and focus your **Understanding Community Leadership** discussion and efforts.
All these resources can be downloaded or linked to from the *Resources* tab of the CFLeads website – www.cfleads.org.

Potential Readings	▪ **On the Brink of New Promise: The Future of U.S. Community Foundations** *Lucy Bernholz, Katherine Fulton and Gabriel Kasper. Blueprint Research & Design, Inc. and Monitor Company Group, LLP. 2005.* This study, available free for download both as a nine-page executive summary and as a complete 62-page report, is what got the community leadership conversation going in the field. It explains the "shifting fundamentals" within the community foundation field – and how that shift points toward taking on more – and more effective – community leadership. ▪ **Community Foundations and Community Leadership** *Cindy Sesler Ballard. Council on Foundations and CFLeads. 2007.* This six-page white paper by CFLeads founding executive director explores the imperatives – both market and moral – for a community foundation to embrace community leadership. ▪ **The Balancing Act III: The Role of a Community Foundation as a Community Leader** *Dorothy Reynolds. The Mott Foundation. 2008* This monograph, written by a former community foundation CEO and long-time community foundation advisor and observer, captures the field's history and current movement toward community leadership in eight easy pages, complete with cautions and inspiring anecdotes from across the globe. ▪ **The Road Not Yet Traveled: A Community Foundation Movement for Social Justice** *Emmett D. Carson, Ph.D. Community Foundations: Symposium on a Global Movement. Berlin, Germany. December 4, 2004* Carson, current CEO and President of the Silicon Valley Community Foundation and former CEO and President of The Minneapolis Foundation, delivered this keynote speech at the first international conference of community foundations in 2004. In it, Carson called for community foundations worldwide to become leaders of a social justice movement – and it is still provocative enough to spark worthy insight and worthwhile debate in any community foundation. ▪ **Community Change Makers: The Leadership Roles of Community Foundations** *Ralph Hamilton, Julia Parzen and Prue Brown. Chapin Hall Center for Children, University of Chicago. 2004.* Based on a series of meetings with senior community foundation leaders, this publication discusses the ways in which community foundations' unique access, agility, credibility, and local knowledge places them in a pivotal position at the center of community life and describes how community foundations throughout the US are using their position to develop and expand their leadership roles. ▪ **Greater Milwaukee Foundation: Built for Leadership** *AND* ▪ **Central Minnesota Community Foundation: Creating a Community Leadership Compass** *Cindy Sesler Ballard. Council on Foundations and CFLeads. 2009* These first two case studies show how community foundations of different shapes and sizes have taken on community leadership, why they have done so, the challenges they have faced and handled, and the results they are seeing. **Check www.cof.org/cflttools and www.cfleads.org for more potential readings.** **More are added as they become available.**
PowerPoint	▪ **On the Brink of New Promise: The Future of U.S. Community Foundations** *Blueprint Research & Design, Inc. and Monitor Company Group, LLP. 2005.* This PowerPoint, developed by the team that conducted the study, is a community leadership discussion guide all by itself. It is set up so that any presenter can use it to summarize the main point of **On the Brink**. At the end of that presentation, it offers a set of discussion questions that you can use with your group, some of which lead you to an on-the-spot assessment of some of your foundation's key components related to your community leadership position in the community. Moreover, there are several slides that you can tailor in advance to add your own local content.

Understanding Community Leadership: A List of Discussion Questions

Constructing and asking good questions is critical to having a good discussion
– both about community leadership in general and about where your foundation wants to go with it.

Here is a menu of questions you might consider for your discussion.

"Homework" Questions *Use a selection of these questions to go with the readings. You can:* ▪ *Include them with the reading assignment in advance, and have participants walk in ready with their answers.* ▪ *Or use them for plenary or breakout discussions when you gather the group.*	■ ***The Difference Question***. What are the top two ways that "community leadership" – as it is described in the readings – feels different from what our community foundation is doing today? ■ ***The Concerns Question***. What are my top two concerns about having our community foundation assume a stronger community leadership role? ■ ***The Risks Question.*** What are the two most critical risks we would have to manage if we were to take on more of a community leadership role in our community? ■ ***The Benefits Question.*** What are the top two benefits that we would likely get from playing a greater community leadership role in our community? ■ ***The Energy Question.*** What are the one or two things that most excite me about potentially taking on a greater or stronger community leadership role in our community?
Other Discovery and Direction Questions	■ ***The Experience Questions:*** Has our community foundation ever played a community leadership role? If yes: ▪ *What was our most successful experience (or two)?* ▪ *What was our least successful (or two)?* ▪ *What made the difference?* ■ ***The Positioning and Potential Questions:*** Think about one or two of the most critical challenges or opportunities facing our community or region. What organizations are playing a community leadership role on those critical issues – or have the potential to do so? For each: ▪ *How well are they exercising that role?* ▪ *What hinders them from doing so – or doing more?* ▪ *Are we in a position to help? How are we already helping? How might we do more?* ■ ***The Question of Will:*** Over the next 10 years, do we want our community foundation to play: ▪ *Less of a community leadership role?* ▪ *More of a community leadership role?* ▪ *About the same role as we are today?*
Choice Questions	If you are looking for methods and tools that community foundations are using to choose the issues or situations in which they will play a community leadership role, you can find a series of "Cool Tool" selection criteria, grids and think lists at: **www.cfleads.org/resources/cooltools/index.php**.
Other Potential Applications	You could also *Understanding Community Leadership* readings and ideas to: ▪ ***Orient new staff and board members.*** The readings offer an overview of where the field is and has come – which can really help new staff and board leaders who come to your community leadership table. ▪ ***Peer-exchange and training***. At statewide or regional gatherings of community foundations, the materials or questions can be used to focus table discussions, or in breakout training sessions. ▪ ***Partner and media education***. When your community partners or media ask you about why you are taking on a community leadership role in the community, sharing some of these materials may help you explain why – and how it might benefit them and the community.
Next Steps	Want to start playing more of a community leadership role – or a stronger one? Yes? Then see the **Community Leadership Status Assessment Tool** – and set forth!

Community Leadership Framework

Purpose	The **Community Leadership Framework** is a helpful touchstone for strengthening your foundation's community leadership capacity and results. It breaks down into manageable bites what it takes for community foundations to make the shift from occasionally practicing community leadership to becoming community leadership institutions.
Uses	The **Framework** addresses the challenge of providing structure and language to skill sets and capacities that can make community foundations better at community leadership. The remaining tools in the **Toolbox** are organized around the **Framework** and its building blocks. In concert with other **Toolbox** tools and resources, you can use the **Framework** to:

- Stimulate thinking and learning about the capacities and skills community foundations use and strengthen to improve their community leadership readiness, effectiveness and results.
- Inventory and analyze your foundation's community leadership readiness status today, and determine which building blocks you want or need to strengthen.
- Plan specific new community leadership initiatives – and help determine which capacities you need to develop or strengthen to successfully take on those initiatives.
- Collect and tell the stories of your community leadership efforts in a way that both prepares you to effectively communicate them to stakeholders and the media and helps you do better with future community leadership initiatives.
- Assess and measure your progress in community leadership initiatives – and in strengthening particular community leadership building blocks.
- Reflect on what should be strengthened to make your next community leadership effort more successful.

Framework Organization *Read through this section with the Framework in hand!*	The **Framework** is organized as a structured diagram of significant "building blocks" that make community foundations better community leadership institutions. ▪ Think of each building block as an organizational skill or capacity you are trying to gather and assemble to *build your foundation* for community leadership. ▪ The larger the number of building blocks your community foundation has in place – and the stronger the composition of each block – the more likely you are to succeed in your community leadership efforts and sustain them over time.

Definition *Framework Page 2*	The Framework starts with the definition of "Community Leadership by a Community Foundation." It breaks that definition into its elements to help understand the importance of each word and phrase. Overall, the definition is expressed as a positive "outcome statement." That means it describes what would be true if an individual community foundation fully realized its community leadership potential. The definition is an aspiration and frame of reference for all the building blocks built out below it.
First-Level Building Blocks *Framework Page 3 Top Row: A-D*	The Framework then presents four (4) First-Level Building Blocks. Each of these four building blocks is a primary element or condition that must be place if your community foundation is to achieve the community leadership goal stated in the Definition. But your foundation must strengthen all four of these building blocks to get there – and to weave community leadership into your long-term DNA.
Second-Level Building Blocks *Framework Page 3 In the columns under each First-Level Building Block*	Each First-Level Building Block has its own set of Second-Level Building Blocks. This Second-Level set "breaks down" the capacities and skills that must be in place to make the condition stated in the First-Level Building Block strong and true. Again, each Second-Level building block is important – but your foundation needs to strengthen all of them to become a stronger community leader. In total, the Framework includes 16 Second-Level Building Blocks. *Process Pointers* ➲ *The **Framework Toolbox** generally has you start any community leadership discussion or analysis with a focus on only the First- and Second-Level Building Blocks before you dig any deeper.*

	Third Level Building Blocks
	
	Framework Pages 4-9 In the columns under each First-Level Building Block
		Likewise, each Second-Level Building Block has its own set of Third-Level Building Blocks. The Third-Level "breaks down" the capacities and skills that must be in place to make the condition stated in the Second-Level Building Block strong and true. Again, each Third-Level building block is important – but your foundation needs to strengthen all of them to fortify its Second-Level Building Block.
		
		Process Pointers
		➲ *Generally, you review or address Third-Level Building Blocks in one of two situations.*
		  ▪ *Reviewing them can help you understand in greater detail what constitutes the "parent" Second-Level block.*
		  ▪ *Second, if your foundation prioritizes a particular Second-Level Building Block as one you want to strengthen, you'll then delve into the Third-Level to help you analyze what you might do or how to go about strengthening it.*

Thinking and Working with the Framework	The **Framework** reveals the elements that enable and fortify community leadership – as both more *specific* and more *actionable*. It points you in directions you may never have ventured, and urges you to look beyond the usual suspects in both the learning and doing phases of your community leadership work. It is intended to stretch your thinking. While it looks in many ways like a checklist, it is not of the "been there/done that" variety. It helps to revisit it again and again as you tackle new challenges or stub your toes on old ones. Here are a few other things – some reminders, some new ideas – to keep in mind as you work with the **Framework**: ▪ The community leadership **Definition** is the ideal to which one aspires in the exercise of community leadership. ▪ The **building blocks** do not **_all_** have to be in place for a community foundation to begin working on community leadership. In fact, a community foundation can enter community leadership work at any point, regardless of how many or which building blocks it currently has in place. ▪ The more building blocks a community foundation has in place, and the stronger each is, the more successful it is likely to be in its community leadership efforts. ▪ Some building blocks show up in more than one place because they are important in more than one way. ▪ The level of a building block in the structure has no relationship to its relative importance for your work. The most important building block for your foundation could be at any level – it's the one you don't have in place that you need to do the community leadership work you have at hand right now. ▪ Your best action plans to strengthen your capacity likely can and will strengthen multiple building blocks. ▪ Practicing community leadership actually builds the capacity to do more and better community leadership.	
Once Again: *WHY a Framework?*	The National Task Force on Community Leadership produced this **Framework** with broad input and support from community foundations across the country. ▪ It is not meant to intimidate, but rather to offer a constructive way to look at the complexity of community leadership, see what must be in place to exercise it, and analyze why community leadership efforts sometimes do or do not work. ▪ It is meant to facilitate planning that starts from *analysis* rather than *intuition*, to help you better target exactly the right interventions to achieve your desired results. ▪ It is meant to help make *intentional* the strengthening and exercise of community leadership within the field. Without some framework to analyze and fortify the elements of community leadership, it will remain an ad hoc enterprise. Community leadership will never be institutionalized, much less become a hallmark of community foundations.	
Next Steps	Four tools in the Community Leadership Framework Toolbox will help you use this Framework to strengthen your community foundation's community leadership. Use each as needed! • **Community Leadership Framework Status Assessment Tool (CL SAT)**. This tool is designed to help you gauge your community foundation's community leadership strengths at a particular point in time, to identify the priority community leadership capacities that you want to strengthen, and to set you on a path toward doing so. • **Community Leadership Action Planner Tool.** This tool can help your foundation plan how it will either work on a specific community leadership issue or strengthen a particular **Community Leadership Framework** building block – or both – within the time frame of one year or less. • **Community Leadership Story Tool.** This tool will help you profile, learn from and sharpen one of your foundation's **specific** community leadership efforts.	

FRAMEWORK

*for Community Leadership
by a Community Foundation*

Defining *community leadership*

The framework begins with a definition of what community leadership looks like when it is happening. It is knitted together into a very long sentence where every word matters. It's helpful to begin by unraveling the definition to reveal each strand of thought.

> *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.*

THE COMMUNITY FOUNDATION…

is a catalyzing force

This acknowledges that the community foundation does not act in isolation. It acts in concert with others, sometimes taking the lead, sometimes following, sometimes paving the way for new leaders.

that creates a better future for all

This acknowledges that the community foundation's constituency is the entire community. Every issue, every cause it embraces, has some connection to the greater good.

by addressing the community's most critical or persistent challenges

This acknowledges that the community foundation doesn't shy away from something because it's too hard or "it has always been that way" and it can be counted on to address the things that matter the most.

inclusively uniting people, institutions, and resources

This acknowledges how the community foundation goes about its business: in the open and ensuring broad participation. It also recognizes that the community foundation is well-suited to assemble and leverage resources.

and producing significant, widely shared and lasting results

This acknowledges that the community foundation looks beyond quick fixes and innovative pilot projects, and that it has the staying power to reach long-term results.

Framework *at a glance*

The framework can be used to bring clarity to the definition and practice of community leadership by individual community foundations.

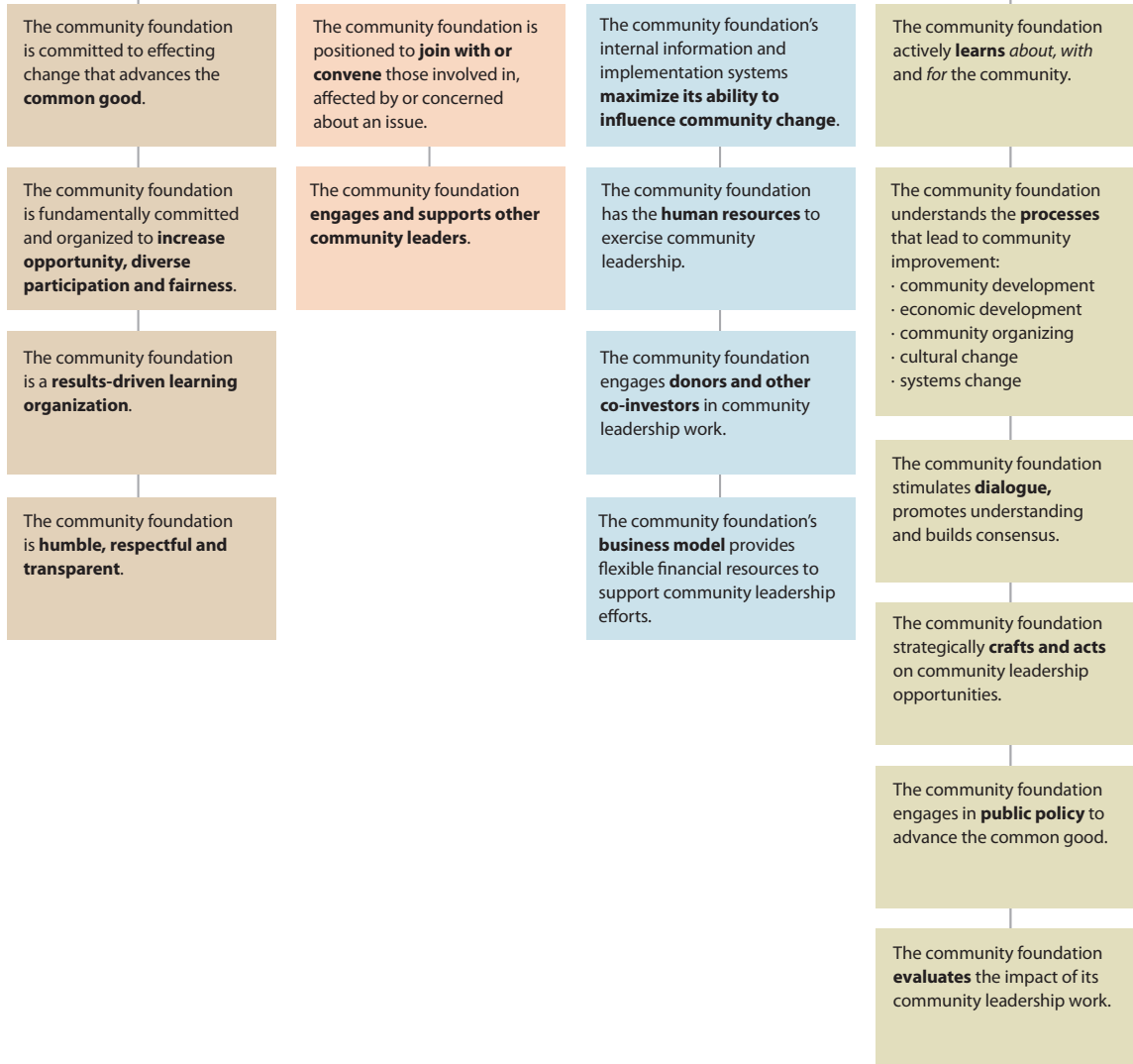### COMMUNITY LEADERSHIP BY A COMMUNITY FOUNDATION

DEFINITION AND OUTCOME

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.

FIRST-LEVEL BUILDING BLOCKS

A	**B**	**C**	**D**
The community foundation manifests the **values, culture and will** to exercise community leadership.	The community foundation continuously builds the **relationships** to exercise community leadership.	The community foundation accesses and develops the **resources** necessary to exercise community leadership.	The community foundation accesses and develops the **understanding and skills** to exercise community leadership.

SECOND-LEVEL BUILDING BLOCKS

A	B	C	D
The community foundation is committed to effecting change that advances the **common good**.	The community foundation is positioned to **join with or convene** those involved in, affected by or concerned about an issue.	The community foundation's internal information and implementation systems **maximize its ability to influence community change**.	The community foundation actively **learns** about, with and for the community.
The community foundation is fundamentally committed and organized to **increase opportunity, diverse participation and fairness**.	The community foundation **engages and supports other community leaders**.	The community foundation has the **human resources** to exercise community leadership.	The community foundation understands the **processes** that lead to community improvement: · community development · economic development · community organizing · cultural change · systems change
The community foundation is a **results-driven learning organization**.		The community foundation engages **donors and other co-investors** in community leadership work.	The community foundation stimulates **dialogue**, promotes understanding and builds consensus.
The community foundation is **humble, respectful and transparent**.		The community foundation's **business model** provides flexible financial resources to support community leadership efforts.	The community foundation strategically **crafts and acts** on community leadership opportunities.
			The community foundation engages in **public policy** to advance the common good.
			The community foundation **evaluates** the impact of its community leadership work.

Considering *building blocks*

BUILDING BLOCK A

The community foundation manifests the **values**, **culture** *and* **will** *to exercise community leadership.*

Second-level building blocks	Third-level building blocks
1. The community foundation is committed to effecting change that advances the **common good**. ▶	1a. The community foundation's mission includes community betterment. 1b. The community foundation consistently acts on clearly articulated values that undergird community betterment. 1c. The board, staff and volunteers are passionately committed to creating a better future for all. 1d. The community foundation subordinates the self-interest of its board, staff, volunteers and donors to the common good.
2. The community foundation is fundamentally committed and organized to increase **opportunity, diverse participation and fairness**. ▶	2a. The community foundation examines and articulates its values of increasing opportunity, diverse participation and fairness. 2b. The community foundation understands that diversity and inclusion enhance credibility and improve effectiveness. 2c. The community foundation's internal policies and practices reflect and support diversity and inclusion. 2d. The community foundation uses inclusion and equity values in choosing its community leadership issues and actions. 2e. The community foundation recognizes and addresses class and other power imbalances in its work with diverse constituencies. 2f. The community foundation advocates for and commits resources to inclusion and equity in all of its work. 2g. The community foundation respects and accounts for the differences, needs, resources and interests of specific constituencies.
3. The community foundation is a **results-driven** learning organization. ▶	3a. The community foundation focuses its community leadership efforts on issues with significant or long-term impact on the community. 3b. The community foundation determines the nature and duration of its community leadership engagement in terms of the outcomes it seeks. 3c. The community foundation examines itself and makes internal changes to increase its impact and effectiveness. 3d. The community foundation learns from and adapts its actions based on routine examination of successes and failures.
4. The community foundation is **humble, respectful** and **transparent**. ▶	4a. The community foundation is prompt, courteous and caring in all of its interactions with the community. 4b. The community foundation is respectful when it disagrees with others. 4c. The community foundation shares or declines to take credit when necessary to advance community leadership goals. 4d. The community foundation accepts criticism and admits mistakes.

Considering *building blocks*

BUILDING BLOCK B

*The community foundation continuously builds the **relationships** to exercise community leadership.*

Second-level building blocks	Third-level building blocks
1. The community foundation is positioned to **join with or convene** those involved in, affected by or concerned about an issue. ▶	1a. Relationship building and outreach are core expectations for community foundation staff, board and volunteers. 1b. The community foundation nurtures relationships and fosters trust throughout the community. 1c. The community foundation has access to a diverse group of leaders through its board, staff, donors, volunteers, grantees, and partners. 1d. The community foundation is actively and directly involved in those neighborhoods and places where it is doing community leadership work. 1e. The community foundation engages the vulnerable and voiceless in community problem-solving. 1f. The community foundation builds relationships with those outside the community whose connections, resources, interests and abilities may support community leadership work.
2. The community foundation **engages** and **supports other community leaders**. ▶	2a. The community foundation follows or joins efforts initiated and led by others. 2b. The community foundation works to build the capacity of leaders throughout the community. 2c. The community foundation engages and supports new leaders, especially from groups underrepresented in the community's leadership structure, to succeed and gain influence. 2d. The community foundation believes that groups within the community should choose their own leaders.

Considering *building blocks*

BUILDING BLOCK C

The community foundation accesses and develops the **resources** *necessary to exercise community leadership.*

Second-level building blocks	Third-level building blocks
1. The community foundation's **internal information and implementation systems** maximizes its ability to influence community change.	1a. The community foundation integrates its community leadership efforts across all functional areas. 1b. The community foundation has a consultative process in place to identify emerging, critical or persistent community issues. 1c. The community foundation has a system to match donor interests with community leadership needs and issues. 1d. The community foundation aligns its grantmaking systems and operational processes to support community leadership. 1e. The community foundation is user-friendly in all of its processes. 1f. The community foundation's information systems are transparent and accessible.
2. The community foundation has the **human resources** to exercise community leadership.	2a. The board, staff, volunteers, donors, grantees and vendors are broadly reflective of the community and its shifting demographics. 2b. The board uses community leadership as a primary criterion in selecting and evaluating the CEO. 2c. The board and staff are entrepreneurial, take risks and learn from their mistakes. 2d. The board and staff take new or courageous stands, when necessary, to move an issue forward. 2e. The board reflects the diverse points of view and levels of influence necessary to effect change. 2f. The community foundation provides ongoing professional development for board, staff and volunteers around community leadership. 2g. The board, staff and volunteers are able to relate to the cultures that make up their community.

Considering *building blocks*

BUILDING BLOCK C (CONTINUED)

The community foundation accesses and develops the **resources** *necessary to exercise community leadership.*

Second-level building blocks	Third-level building blocks
3. The community foundation engages **donors and other co-investors** in community leadership work. ▶	3a. The community foundation systematically helps current and prospective donors deepen their understanding of community issues. 3b. The community foundation connects donors and potential co-investors to opportunities to increase the impact of their investments. 3c. The community foundation's donors use their influence and connections to advance community leadership efforts. 3d. The community foundation provides feedback to donors and other co-investors about the impact of their support. 3e. The community foundation encourages donors to structure gifts in ways that can flexibly address changing community needs over time. 3f. The community foundation provides donors with philanthropic options outside the community foundation when donor interests are incompatible with its values.
4. The community foundation's **business model** provides flexible financial resources to support community leadership efforts. ▶	4a. Operations are efficient, freeing resources for community leadership. 4b. The community foundation has income-generating, budgeting and leveraging strategies to support community leadership, such as: · fees from donor funds · earned income · unrestricted endowment income · public sector funds · corporate and foundation grants · annual campaigns and special events. 4c. The community foundation knows the cost of each service it provides relative to the revenue it generates, and aligns subsidies as needed to serve community leadership efforts. 4d. The community foundation knows how to use community and portfolio investments outside of grantmaking to support community leadership efforts.

Considering *building blocks*

BUILDING BLOCK D

The community foundation accesses and develops the **understanding and skills** *to exercise community leadership.*

Second-level building blocks	Third-level building blocks
1. The community foundation actively **learns** *about, with* and *for* the community. ▶	1a. The community foundation has current and historical knowledge of the institutions, leadership, economy, demographics, natural and built environment, and culture of its area. 1b. The community foundation reaches out to people in the community to understand their perspectives, gain their knowledge and engage them in identifying solutions. 1c. The community foundation finds or generates objective information it needs but may not have. 1d. The community foundation looks beyond current strategies for solutions.
2. The community foundation understands the **processes** that lead to community improvement: · community development · economic development · community organizing · cultural change · systems change	
3. The community foundation stimulates **dialogue**, promotes understanding and builds consensus. ▶	3a. The community foundation has the skills and ability to use convening to produce results. 3b. The community foundation has the skills, strategies and capacity to effectively tell community leadership stories. 3c. The community foundation tailors its communications to diverse audiences. 3d. The community foundation uses non-traditional communication outlets and new media to ensure community-wide reach. 3e. The community foundation frames issues in ways that resonate with those who can make change happen. 3f. The community foundation stays current with communication technology. 3g. The community foundation is a trusted source and provider of information about the community.

Considering *building blocks*

BUILDING BLOCK D (CONTINUED)

*The community foundation accesses and develops the **understanding and skills** to exercise community leadership.*

Second-level building blocks	Third-level building blocks
4. The community foundation strategically **crafts and acts** on community leadership opportunities. ▶	4a. The community foundation understands the multiple roles and range of tools it can use to leverage change. 4b. The community foundation identifies the ways it is willing and able to add value to a community leadership issue. 4c. The community foundation knows when to work behind the scenes, when to take a stand, when to partner, and when to build the capacity of others to effect change. 4d. The community foundation nimbly anticipates and responds to emerging opportunities and challenges. 4e. The community foundation sustains its efforts to achieve its outcomes.
5. The community foundation engages in **public policy** to advance the common good. ▶	5a. The community foundation understands the public policy process and resource streams. 5b. The community foundation cultivates relationships in all three branches of government and at the federal, state and local levels. 5c. The community foundation knows when and how to effectively participate in the policy process. 5d. The community foundation knows and takes advantage of the range of advocacy options the law allows to 501(c)(3) organizations.
6. The community foundation **evaluates** the impact of its community leadership work. ▶	6a. The community foundation has a long-range vision, plan and outcome-oriented goals for its community leadership work. 6b. The community foundation gathers data, information and community feedback to measure, inform and adjust its community leadership work.

COUNCIL on FOUNDATIONS

Community Foundations **Leadership Team**

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2008 Framework for Community Leadership
by Community Foundations

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Community Leadership Status Assessment Tool (SAT)

Purpose	The **Community Leadership Framework Status Assessment Tool** (CL SAT) is designed to help you gauge your community foundation's community leadership strengths at a particular point in time, to identify the priority community leadership capacities that you want to strengthen, and to set you on a path toward doing so.
Uses	Overall, the **CL SAT** helps you use the **Community Leadership Framework** as a simple checklist for considering the attributes and capacities your community foundation has in place to engage in community leadership—and identifying the next steps you need to take to achieve those attributes/capacities that you want but don't have. Used with the **Community Leadership Framework** and its Building Blocks – it can help your board and/or staff: ■ Use an easy rating system to develop a shared sense of how strong each of the 16 second-level building blocks in the **Community Leadership Framework** are in your foundation. ■ Surface any differing perceptions of your community leadership strengths and weaknesses – and discuss them. ■ When used on a regular basis – for example, annually – see the progress you are making in strengthening your community leadership capacity, and note when building blocks need bolstering. ■ Set priorities for specific building blocks you want to strengthen right now. ■ Analyze – by reviewing the third-level building blocks related only to your priorities – the particular capacities you want to strengthen. ■ Summarize and track your action plan for strengthening your priority building blocks.

Tool Instructions	**Set a Process**	First, design the process in which you will use the CL Status Assessment Tool. Determine: ■ **Who will participate?** Use this tool with an Assessment Team. For example, you might use this tool with the entire board and staff, or with a key committee or special ad hoc group. ■ **Organized how?** You can have the entire group fill out the entire assessment. Or split into more than one group, and have each group complete the entire assessment and then compare results (always a revealing practice!). Or split into groups and have each group focus on assessing one of the four main building blocks. Or … create another option. ■ **Over what period of time?** It's best to use this tool at regular intervals, at least annually, to check back on your action and progress. Likewise, it makes sense to conduct the assessment in a time-limited process, over a specified two weeks or month, for example. ■ **Connected to what other action?** The CL SAT is a stronger tool when accountability to its results are woven into other community foundation activities – whether that is action planning on specific projects, regular evaluations in which you check back on how your SAT score has changed, staff development and performance appraisals, or strategic planning.
	Gather	Assemble your Assessment Team or Teams – according to your plan – in person, on the phone, or in an electronic meeting to conduct the assessment.
	Rate the Building Blocks	Complete the check-list rating in the **CL Status Assessment Tool** that begins on page 24. Again, according to your particular plan, have your team or teams do so as follows: ■ First, as individuals, rate each second-level building block – in answer to the question: *How strong is our foundation in relation to this Building Block?* – by placing a check mark (✔) in the appropriate box. ■ Just like grades in school, assign each answer a number score: Barely (1), So-So (2), Fairly (3) and Very (4). Add up your individual scores to come up with the Group Average. ■ If you have used the SAT in the past, note whether the Group Average has gotten better, worse or is the same since your last assessment. ***Process Pointers*** ➲ *You can have each team member complete their check list rating prior to your working session, and submit them to the team leader in advance to fill in the Group Average and the "How Moved?" column. (Doing so anonymously may increase candor.)* ➲ *Alternatively, you could complete the entire rating as a group, discussing as you go. This might surface obvious points more quickly, but likely will not give equal voice to all team members. It works best with a team that has an established a record of trust and frankness.*

Community Leadership Status Assessment Tool (SAT) Use and Instructions – 2 of 2

Tool Instructions ...continued...	Discuss and Prioritize	With the initial ratings complete, it's time to talk through what they mean for your foundation.

With the initial ratings complete, it's time to talk through what they mean for your foundation.

- **Note clear results.** Have your Assessment Team or Teams walk through the results. Notice the second-level building blocks where your community foundation is strong and not so strong – or where it has made progress or declined since your last assessment (if relevant).
- **Note differences – and clarify**. If different members of your team produced widely differing ratings on any building blocks, discuss it, and see if you need to adjust your rating. Likewise, if you are comparing the assessment results of more than one team, notice where your building block ratings differ. Discuss those differences to arrive at a consensus rating.
- **Identify a few priorities for strengthening.** Based on the results, and on your knowledge of what your foundation is taking on over a specified timeframe – the next six months or year, for example – choose a few priorities for strengthening.
- **Get more specific about what you need to strengthen.** Using the **Community Leadership Framework** as your reference, identify third-level building blocks that you need to strengthen in relation to each **priority** second-level building block.
- **Recognize and Celebrate!** If you have noted clear progress on a building block, or if you are simply happy that you have some very strong building blocks, give credit where it is due, and celebrate appropriately!

Process Pointers
- ➲ *Always have the Community Leadership Framework on hand as you work with the SAT.*
- ➲ *Make sure you have a good block of time to discuss differences and set priorities. This is a critical part of the process – it is the most important "value" that the tool "adds."*
- ➲ *Limit the number of priorities you set within an action time period to no more than five.*
- ➲ *If you find some disagreement on the second-level building block ratings, you may find that reviewing and discussing the relevant third-level building blocks will help you understand your differences and clarify a rating.*
- ➲ *It's important to complete the rating and priority-setting process – that is, your inventory of the **entire** Framework – before developing action steps. Why? Because some of your strategies might end up addressing more than one priority building block!*

Begin to Plan

Once you've identified the five or fewer priority second and third-level priority building blocks you want to strengthen over your specified action period, it's time to begin to sketch out action steps. Use the SAT tool two ways to do this:

- **Brainstorm and narrow.** Work with the team to brainstorm tactics and strategies you might use to strengthen your priority building blocks. Narrow those to your lead ideas and list them in the Key Action Step box. For each Key Step, list a "Lead" person who will be responsible for pursuing it, and the relevant time frame for that next step.
- **Notes and Observations.** Use this space to record all any really important insights, details or caveats you want to remember in relation to the priority building blocks and your action plan next time you do your assessment.

Process Pointers
- ➲ *You could alternatively use the Key Action Step block as a shorter-term "Next Steps" task list, detailing research or outreach you need to do before developing a real Action Plan.*

Proceed!

Assign staff and board members to devise a fuller action plan using the **Community Leadership Action Planner Tool.**

Repeat

Use this tool at regular intervals to help you "see" progress, celebrate it, and get stronger over time.

Other Potential Applications	You could also use this tool related to:

You could also use this tool related to:

- **A Significant Community Leadership Effort or Collaborative.** Use **SAT** when you are trying to figure out which members of a partnership or collaborative should assume specific roles in a major initiative.
- **Group Training or Peer-Learning**. Have a participating group of community foundations each fill out the SAT in advance to help determine the content and agenda focus for a seminar, training or peer-exchange gathering.

Next Steps	See **Community Leadership Action Planner Tool.**

(Click on the Attachments panel to open this template in MS Word)

Framework Building Block A

The community foundation manifests the values, culture and <u>will</u> to exercise community leadership.

Second-Level Building Blocks ➜	How strong is our Foundation in relation to this Building Block?					How has this moved since our last SAT? (Better ← / Same = / Worse →)	Is improving this a Top Priority?	*For Top Priorities Only* — What THIRD-LEVEL BUILDING BLOCKS must we strengthen to get better?	Notes and Observations — *Things to keep in mind as we plan our action – or when we check back in for our next Community Leadership SAT!*
	Barely	So-So	Fairly	Very	*Group Average*				
1. We are committed to effecting change that advances the **common good.**									
2. We are fundamentally committed and organized to increase **opportunity, diverse participation and fairness.**									
3. We are a **results-driven, learning** organization.									
4. We are **humble, respectful and transparent.**									

Key Action Steps to address PRIORITY Building Blocks
See Community Leadership Action Planner – and transfer these steps into that Tool.

Lead Responsible	Time Frame

Community Leadership Framework Status Assessment Tool (SAT)　　　　Date of Assessment: _____　　　　Time Period for Action Steps: _____

Framework Building Block B

The community foundation continuously builds the <u>relationships</u> to exercise community leadership.

Second-Level Building Blocks →	How strong is our Foundation in relation to this Building Block?					How has this moved since our last SAT? Better ← Same = Worse →	Is improving this a Top Priority?	*For Top Priorities Only* What THIRD-LEVEL BUILDING BLOCKS *must* we strengthen to get better?	Notes and Observations *Things to keep in mind as we plan our action – or when we check back in for our next Community Leadership SAT!*
	Barely	So-So	Fairly	Very	*Group Average*				
1. We are positioned to **join with or convene** those involved in, affected by or concerned about an issue.									
2. We **engage and support other community leaders.**									

Key Action Steps to address PRIORITY Building Blocks
See Community Leadership Action Planner – and transfer these steps into that Tool.

Lead Responsible	Time Frame

Community Leadership Framework Status Assessment Tool (SAT) Date of Assessment: _____ Time Period for Action Steps: _____

Framework Building Block C

The community foundation accesses and develops the <u>resources</u> necessary to exercise community leadership.

Second-Level Building Blocks →	How strong is our Foundation in relation to this Building Block?					How has this moved since our last SAT? Better ↑ Same = Worse →	Is improving this a Top Priority?	*For Top Priorities Only* What THIRD-LEVEL BUILDING BLOCKS must we strengthen to get better?	Notes and Observations *Things to keep in mind as we plan our action – or when we check back in for our next Community Leadership SAT!*
	Barely	So-So	Fairly	Very	*Group Average*				
1. Our internal information and implementation systems **maximize our ability to influence community change.**									
2. We have the **human resources** to exercise community leadership.									
3. We engage **donors and other investors** in community leadership work.									
4. Our **business model** provides flexible financial resources to support community leadership efforts.									

Key Action Steps to address PRIORITY Building Blocks
See Community Leadership Action Planner – and transfer these steps into that Tool.

Lead Responsible	Time Frame

(Click on the Attachments panel to open this template in MS Word)

Framework Building Block D

The community foundation accesses and develops the understanding and skills to exercise community leadership.

Second-Level Building Blocks →	How strong is our Foundation in relation to this Building Block?					How has this moved since our last SAT? (Better ← Same = Worse →)	Is improving this a Top Priority?	*For Top Priorities Only* — What THIRD-LEVEL BUILDING BLOCKS must we strengthen to get better?	Notes and Observations — *Things to keep in mind as we plan our action – or when we check back in for our next Community Leadership SAT!*
	Barely	So-So	Fairly	Very	*Group Average*				
1. We actively **learn** *about with* and *for* the community.									
2. We understand the **processes** that lead to community improvement: *community development, economic development, community organizing, cultural change and systems change.*									
3. We stimulate **dialogue,** promote understanding and build consensus.									
4. We strategically **craft and act** on community leadership opportunities.									
5. We engage in **public policy** to advance the common good.									
6. We **evaluate** the impact of our community leadership work.									

Key Action Steps to address PRIORITY Building Blocks — *See Community Leadership Action Planner – and transfer these steps into that Tool.*	Lead Responsible	Time Frame

Framework Building Block A

The community foundation manifests the values, culture and will to exercise community leadership.

Second-Level Building Blocks →	How strong is our Foundation in relation to this Building Block?					How has this moved since our last SAT? (Better ← / Same = / Worse →)	Is improving this a **Top Priority?**	*For Top Priorities Only* What THIRD-LEVEL BUILDING BLOCKS *must we strengthen to get better?*	Notes and Observations *Things to keep in mind as we plan our action – or when we check back in for our next Community Leadership SAT!*
	Barely 1	So-So 2	Fairly 3	Very 4	Group Average				
1. We are committed to effecting change that advances the **common good.**	X X	x	X X x	X X	2.7	←			
2. We are fundamentally committed and organized to increase **opportunity, diverse participation and fairness.**	X X	X X X x	X		1.9	=	✓	2e. The CF's internal policies and practices reflect diversity and inclusion. 2f. The CF advocates for and commits resources to inclusion and equity in all its work.	Last year, we said we were going to do more outreach in our hiring process, but we did only minimal outreach – got too busy addressing the economic downturn to return to it.
3. We are a **results-driven, learning** organization.		X X X	X X X x		2.6	=			
4. We are **humble, respectful and transparent.**			X X X X	X X x	3.4	←			

Key Action Steps to address PRIORITY Building Blocks
See Community Leadership Action Planner – and transfer these steps into that Tool.

	Lead Responsible	Time Frame
1. Commit to an inclusive hire for our next open position.	CEO and HR director	One year – By 12.2010
2. Require an inclusion and equity section in every project report – at staff and board meetings.	Program staff	Pilot over next six months and revisit – 06.2010
3. Include inclusion and equity considerations in grant criteria and applications.	VP Programs	Three months – 03.2010

SAMPLE

Community Leadership Action Planner Tool

Purposes	The **CL Action Planner Tool** is designed to help your foundation plan how it will either work on a specific community leadership issue or strengthen a particular **Community Leadership Framework** building block – *or both* – within the time frame of one year or less.
Uses	This tool helps you: ▪ Clearly state a community leadership issue you want to work on, and/or a building block you want to strengthen. ▪ Surface and detail the reasons it is important to your foundation. ▪ Describe what success will look like – in terms of results, indicators and measures. ▪ Develop the contours of your action plan, including Key Action Steps and substeps, responsibilities and deadlines. ▪ Set a plan to track your indicators and measures.

Tool Instructions		
	Identify	Choose the community leadership issue or building block you want to act on – and the timeframe for the action plan. ***Process Pointers*** ⮑ *Though your community leadership effort may be longer term, focus your action plan on a short time frame. For example, if you use a timeframe of four-to-six months, your action steps are likely to be more discrete and doable – and the nearer-term deadlines will help you make progress, and see progress.*
	Gather	Assemble a team including staff, board, and/or key partners – in person, on the phone, or in an electronic meeting.
	Complete	Develop your action plan and measurement plan using the **Community Leadership Action Planner Template** *(see next page)* ***Process Pointers*** ⮑ *You can have one or two people draft the plan using the Template, and then sharpen it during a broader team discussion – in person, or by soliciting feedback comments.* ⮑ *You might parcel out the action plan and the measurement plan to different groups – but make sure they come to agreement before finalizing the plan.* ⮑ *Include securing any key resources and partnerships you need as part of your action steps – and as indicators in your measurement plan.*
	Repeat as needed	Use this tool again, or use it in combination with the **Community Leadership Story Tool,** to check back on your progress, and to develop an action plan for your next time frame. Doing so at regular intervals can help you "see" and celebrate progress and keep you on track. It can also help you make critical mid-course corrections at the right time, rather than bemoan inaction after the fact.

Other Potential Applications	Use this simple tool in other ways: ▪ ***Propose Community Leadership Action***. Have staff or board members use the **Action Planner** – or parts of it – to *propose* community leadership activities for your foundation, or to offer options for how you might strengthen particular building blocks. If you fill out one Action Planner form for each set of options or ideas, it will be easier to compare them in a discussion or strategy session. ▪ ***Maintain a Stock of Institutional History and Memory***. Adapt the Action Planner to profile major or minor building-block-strengthening or community leadership initiatives or that your foundation has completed over the past 10 years – or longer! Keep them in a central place (in a binder, or in a computer folder). Use them to orient new staff and board members, or consult them when you are writing or shaping helpful stories for donors, partners, grantees or the media. ▪ ***Peer-Learning and Advising.*** Use this **Action Planner** when you get together with other foundations that are taking on the **same** community leadership building block or issue – as an outline for telling each other how you plan to address it. Having similar information will help you understand, advise and sharpen each others' action plans.

Community Leadership Framework Toolbox

Community Leadership Action Planner Template

Tool Use	Plan a specific Community Leadership initiative or effort?	Strengthen a specific Community Leadership Framework Building Block?
Are we using the tool to: *Check one or both!*		

Issue Being Addressed *What is this Action Plan addressing?* *Staying in the column checked above, name what this plan will address:* • *a community leadership challenge* **and/or** • *a specific CL Building Block*		

Reasons *Describe the top two or three reasons we are choosing to:* • *act on this community issue* **OR** • *strengthen this particular Building Block*	1. 2. 3.

Time Frame *Specify a specific time frame for this Action Plan of one year or less.* *Include a start date and end date.*	

Desired Results	A **Results We Want** *These three results will be "true" if we succeed with our work on this issue and/or building block over time* *Hint: Write the result as a complete sentence.*	B **Measures** *We will measure these indicators to track our progress on the result in Column A during the time frame of this planning period.* *Hint: Include both the indicator and the amount and direction (increase, decrease, quality, presence) of "improvement" you targeting.*
List: *In Column A: The top three most notable results we are going for in this effort in relation to the issue* **OR** *Building Block.* *In Column B: One or two indicators that we will monitor and measure during this time period for each result to tell us whether or not we are on the right track.*	1.	a. b.
	2.	a. b.
	3.	a. b.

Community Leadership Framework Toolbox

Community Leadership Action Planner Template

Key Action Steps

What will we do to produce the desired results?

Specify up to three primary Key Action Steps we will take to address the issue and/or building block in this time frame.

Then detail specific substeps and the lead people, partners or groups responsible for each, along with interim deadlines.

Key Action Step 1:		
Substep	Lead Responsible	Deadlines

Key Action Step 2:		
Substep	Lead Responsible	Deadlines

Key Action Step 3:		
Substep	Lead Responsible	Deadlines

Tracking

Tracking our indicators and measures related to our desired results is always part of our action plan.

List here who and how we will do that for each measure we detailed above.

Indicator and Measure	Who will track it? How?	Tracking Report(s) Due:

Next Steps

Use the **Community Leadership Story Tool** to develop interim reports on a specific community leadership effort.

Use the **Community Leadership Framework Status Assessment Tool** to track progress on your Building Blocks.

Community Leadership Story Tool

Purposes	The **CL Story Tool** is designed to help you profile, learn from and sharpen one of your foundation's <u>**specific**</u> community leadership efforts.
Uses	This tool helps you: ▪ Outline the primary components of your community leadership effort, so that the basics can be more easily and clearly understood by board, staff and key partners. ▪ Detail what has happened as a result of your Community Leadership action. ▪ Diagnose which Community Leadership Framework building blocks are critical to your effort, which you need to strengthen, and how. ▪ Reflect on your progress for far, and plot your next steps. ▪ Develop "after-action lessons" that you will apply to your next relevant Community Leadership effort – or to your overall Community Leadership skills and capacity.

Tool Instructions	**Identify**	Choose a current or prior community leadership effort by your foundation that you want to analyze, plan the next steps for, or improve.
	Gather	Assemble a team including board, and/or key partners – in person, on the phone, or in an electronic meeting.
	Complete	Document the elements of the story by filling out the **CL Story Template**. *Process Pointers* ➲ *You can have someone fill out the basic information – the unshaded sections in the template -- prior to your working session.* ➲ *During the session, you can work together to fill out the remaining (shaded) boxes.*
	Analyze	Work towards consensus on your conclusions and lessons as they emerge in your discussion.
	Plan	If your community leadership effort is in process, determine what you will do next – and what you will do different! *Process Pointer* ➲ *If you are making big changes to this Community Leadership effort or taking on a new one, use the **Community Leadership Action Planner** Tool.*
	Repeat as needed	If you use this tool at regular intervals in the lifetime of a community leadership effort, it can help you "see" and celebrate progress and keep you on track. It can also help you make critical mid-course corrections at the right time, rather than bemoan inaction after the fact.

Other Potential Applications	Get creative! Use this simple tool in other ways: ▪ ***CL Project Status Reports***. Use the **Story Tool** – or part of it – to regularly refresh the "current profiles" of your foundation's key community leadership efforts. Put them in the Board Book for your board meetings, on your website, to brief your partners or the media – or wherever it makes sense to share the information. ▪ ***Baseline – or Comparative – Assessment***. To get a good baseline on your foundation's overall Community Leadership capacity (before using the **Status Assessment Tool** for example), apply this tool to more than one story from your foundation's history, and look for patterns – for example, which building blocks have emerged as most important across several community leadership projects? Or have more than one team member fill out the template for the same story – and see what you can learn from each other's shared or differing perspective ▪ ***Peer-Learning and Advising.*** Use this **Story Tool** when you get together with other foundations as an outline for telling each other your community leadership stories. You can do this as part of an introduction session to learn about each other, or as a breakout session where you advise each other on how to do better.
Next Steps	If using this tool helps you conclude that you need to make big changes to this community leadership effort, use the Community Leadership Action Planner Tool.

Community Leadership Framework Toolbox

Community Leadership Story Template

Community Foundation Name	
Title of Story	
Community Issue Addressed *Name the critical issue that we are or were addressing.*	
Reasons *Describe the top two or three reasons we chose to act on this community issue.*	1. 2. 3.
Desired Results *List the top three most notable results we are/were going for in this effort in relation to the issue (and our foundation, if relevant).*	1. 2. 3.
Primary Strategies/ Key Action Steps *What did we do? Specify the three primary strategies we undertook to address the issue, and key action steps related to each.* *Note: Refer to our CL Action Planner Tool if we filled it out at the start of this effort and are using this as an interim report.*	1. 2. 3.
Partner Role *Did we conduct any part of this effort with other lead partners? Name them and describe, in brief, the role they played.*	

Community Leadership Framework Toolbox

Community Leadership Story Template

Results *List the top three most notable ways this leadership effort has made a difference in relation to the community issue (and our foundation if relevant).* *Note: Refer to our CL Action Planner Tool if we filled it out at the start of this effort and are using this as an interim report.*	1. 2. 3.
Missing Result *What is the one result, if any, that we hoped we'd achieve but have not? Why not?*	
Factors / Building Blocks Critical to Success *Identify two factors that were most critical to our ability to take on this leadership effort.* *Note any second- or third-level CL Framework Building Blocks associated with these factors.* ***Example*** ▪ ***Factor****. This effort would have failed without the active participation of the Health Commissioner.* ▪ ***Building Block****. B1: The CF is positioned to join with or convene those involved in, affected by or concerned about an issue.*	1. 2.
Stronger Building Blocks *Which two second- or third-level Building Blocks did we strengthen as a result of or in the course of engaging in this effort?*	1. 2.
Building Blocks Yet to Strengthen *Which two second- or third-level building blocks do we wish had been stronger? Why?*	1. 2.
Community Leadership Action Lessons *What other action lessons do we specifically want to apply next to this effort – or other community leadership effort by the foundation?*	
Next Steps	See **Community Leadership Action Planner Tool.**