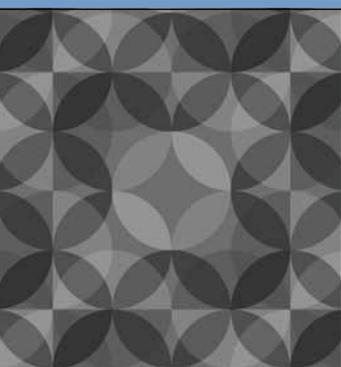




THE ASPEN INSTITUTE  
Roundtable on Community Change



## PERFORMANCE MANAGEMENT IN COMPLEX, PLACE-BASED WORK

*What It Is, What It Isn't, and Why It Matters*

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## Introduction

Considerable attention is currently focused on the potential for systematically collecting and reviewing key program data as a way to manage performance, improve outcomes, and achieve greater impact in the public, private, and nonprofit sectors.

The practice of performance measurement and management has a lengthy history although interest and use has ebbed and flowed. The practice dates from the 1960s and 1970s, when it was developed as a tool that helped human resources departments in the private sector identify high-performing managers and determine eligibility for merit raises. In the 1980s and 1990s, this approach was embedded in new management approaches like Management by Objectives and Results-Based Accountability. In the last few years, government and philanthropic funders have seized on performance management as a way to achieve better results in the nonprofit sector, especially in social welfare programs and economic development efforts. The current focus on performance management has been spurred by an emphasis on evidence-based decision-making in federal policy and a resurgence of interest in the potential for multi-sector collaborations to achieve big effects on recalcitrant public problems through “collective impact.”

Believing that performance management offers both real opportunities and special challenges in complex, place-based work, the Aspen Institute Roundtable on Community Change brought together a group of high-level practitioners, researchers, foundation staff, policy experts, and government staff from a variety of fields to explore these themes.<sup>1</sup> This paper reflects and distills their collective wisdom on what performance management entails, why it is useful, and how to do it well. Drawing on the meeting discussions, pre-meeting conversations with each of the participants, and relevant reports and studies, it offers a definition of performance management and its core components; explores why it is particularly challenging in complex, place-based change efforts; discusses “good practice” lessons; and considers how performance management differs from evaluation.

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## Defining Performance Management

We have found that people are casting a large net around the term “performance management” and using it to refer to a number of different activities that use data to plan, implement, and evaluate an intervention. Not all of the activities described as performance management are directly or primarily related to improving operational performance on the ground, however. We suggest that a more careful use of the term would help avoid confusion and focus attention on its key elements. Employing the same term to refer to quite different practices waters down the usefulness of the concept and makes it harder to draw operational lessons.

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1. The meeting on Performance Measurement and Management in Place-Based Work was held January 4, 2012, at the Aspen Institute in Washington, D.C. A list of the participants can be found at the end of this paper.

We offer the following definition:

*Performance management is a process that involves collecting and reviewing data on program performance in order to identify what's working, pinpoint and resolve problems, and improve effectiveness and efficiency on the ground in real time.*

The goal of performance management is to improve the effectiveness of a program or an initiative while it is being operated. In the vocabulary of community change work, performance management is a tool that can help place-based efforts make “continuous improvements,” introduce “midcourse corrections,” adjust to changing circumstances and conditions, and increase the likelihood of achieving outcomes.

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## Critical Components of Performance Management

The Roundtable’s conversations with a broad spectrum of researchers, practitioners, policy experts, and funders identified three critical components or stages of performance management:

- *Performance planning: setting goals, data requirements, and performance standards*
- *Performance measurement: collecting information on each stakeholder’s performance and group progress toward the collective goals*
- *Performance management: reviewing the data to diagnose problems and develop strategies to improve stakeholder performance*

### *Performance planning: setting goals, data requirements, and performance standards*

Creating a shared vision among multiple stakeholders and clarifying each stakeholder’s contribution to collective goals are critical steps in any complex, place-based change effort. They are also the starting point of performance management. For performance management purposes, discussions about goals need to go beyond vague aspirations and be framed with a fair amount of specification. A well-articulated theory of change can help clarify what each of the various stakeholders is expected to do and how the various stakeholder activities will work together to produce the desired outcomes.

Planning for performance management involves several additional activities. Stakeholders need to develop agreements that specify what performance data will be collected, by whom, how it will be reported, when it will be reviewed, and who will review it. Stakeholders also need to choose a set of indicators that mark progress toward the goals, and identify benchmarks that specify the level of performance that is expected or planned.

*Performance measurement: collecting information on each stakeholder's performance and group progress toward the collective goals*

In the performance measurement stage, stakeholder organizations collect, record, and share data on their activities on an ongoing basis in accordance with the agreed-upon plan. The data used in performance management typically include inputs, outputs, and outcomes. Inputs are the resources that are used, such as funds expended or number of staff involved. Outputs relate to the quantity and quality of the work activity completed. Service programs, for example, collect output data relating to the frequency, type, and quality of services as well as information about the characteristics of the participants, the length of time participants stay in the program, and how satisfied they are with the services.

Outcomes are the results of participating in the services or activities, such as GED attainment, improvements in reading scores, employment gains, increased income, and the like. Interim outcomes measure progress toward longer-term goals. For example, third grade reading scores and eighth grade reading scores can be interim outcomes on a path to high school graduation; employment and earnings gains or employment retention can be markers of progress toward poverty reduction. Information on inputs in relation to outputs or outcomes can provide program managers with indicators of efficiency or productivity.

In a collaborative effort, data need to be collected and reviewed at both the program level and the initiative or collaborative level. Some data that are collected by a stakeholder organization should be shared with all stakeholders. Other information is useful only to a particular organization for its own internal management purposes and need not be reported to all stakeholders. Specifying this at the outset can help avoid problems later in the process.

*Performance management: reviewing the data to diagnose problems and develop strategies to improve stakeholder performance*

Performance measurement should not be confused with performance management. Data collection alone is not enough. To manage performance, managers must review the data routinely and systematically to determine whether they are on the right track and how to be more effective. Comparing actual performance with planned or expected performance (as specified in previously determined benchmarks) allows the stakeholders to pinpoint where things are going well and where there are problems. If problems are identified, further analysis and additional information are needed to diagnose them and decide what can be done to increase effectiveness and make greater progress toward the goals.

A critical issue to consider, at both the organizational level and the collaborative level, is whether problems are due to theory failure or implementation failure. Several types of questions can be useful to answer in the process of collective problem solving:

- *Review the theory of change:* Are the underlying assumptions in the theory of change correct? Are the dose and scale of the intervention sufficient to produce the desired results? Is there a mismatch between the goals and the resources and capacities that are available?

- *Review the implementation process:* Are the planned activities, programs, and other components implemented as intended? Are they reaching the targeted population? If not, why?
- *Assess the role of individual partners:* Are some not performing as intended?
- *Consider contextual factors:* What larger demographic, economic, or political events or trends may be affecting the collaborative effort?

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## Special Challenges of Performance Management in Complex, Place-Based Efforts

Much that guides current practice on performance management is based on studies of performance management in single organizations or in multi-agency collaboratives that work on a relatively narrow range of individual-level outcomes. While these efforts are helpful in understanding the components of performance management, they do not address the special challenges of measuring and managing performance in complex, place-based change efforts.

Complex, place-based change efforts—often called community change initiatives or CCIs—vary widely but have three primary characteristics in common. First, because they are place based, they are focused on a defined geography—for example, a neighborhood, a town, or a county—and aim to affect the entire resident population. Second, they are comprehensive. This means they work across a broad spectrum of social, economic, and physical conditions, and aim at changing individuals, families, communities, and even systems. Third, they value community-building objectives and outcomes such as increased social capital, expanded community capacity, and development of civic voice. They also pay attention to racial diversity and racial equity.

These characteristics increase the challenges of performance measurement and management in place-based change efforts in several ways:

1. *These are collaborative efforts that involve multiple stakeholders, multiple layers, and multiple moving parts, and seek change across a broad spectrum of outcomes.*

Having so many partners on so many levels makes it difficult for stakeholders to reach agreement on goals and indicators, develop common definitions for data tracking, hold each other accountable, and decide on needed improvements. Different types of programs track very different kinds of inputs and outputs: Services provided are very different from houses built, which are very different from students taught. The data track different units of analysis in different institutional settings over different time frames.

Complex community change work often involves not only multiple stakeholders but also multiple layers of management. Aligning these layers further complicates the performance management challenge. Performance management needs to be done at the organizational or program level, for example, as well as at the collaborative level.

A number of place-based initiatives have multiple sites in the same city (like the John D. and Catherine T. MacArthur Foundation’s New Communities Program in Chicago and The Skillman Foundation’s Good Neighborhoods Initiative in Detroit), in the same state (like The California Endowment’s Building Healthy Communities), or in different states (like LISC’s Building Sustainable Communities strategy and the federally funded Promise Neighborhoods). Aligning performance management at all these levels and ensuring that they are all working together toward common goals is very difficult. Developing a common reporting system across all the sites in a multi-site initiative is particularly challenging, as plans and capacities will vary greatly across locations. In addition, a desire to impose reporting requirements runs counter to the value placed on local decision-making.

2. *Community-level outcomes—community capacity, community cohesion, neighborhood satisfaction, collaboration, organizational capacity—are often hard to track, measure, and quantify.*

As noted, most studies of performance management document efforts in single organizations or multi-agency collaboratives that focus on inputs, outputs, and outcomes relating to services provided to individuals or families. These efforts rarely need to measure population-level outcomes. Those that do typically use population-level data that can be aggregated from program-level outputs or individual-level outcomes. They might track, for example, third grade reading scores or high school graduation rates, low-birth-weight births, infant mortality rates, or teen pregnancy rates in a neighborhood, city, or county. Or they might track selected outcomes for all participants in after-school programs in a particular location. Because service-related measures and indicators can be readily quantified, they are easier to collect and share across a collaborative or a network of service providers.

While complex place-based change efforts might use data of this type, they also aim for outcomes like increased community capacity, greater community cohesion, higher levels of neighborhood satisfaction, increased organizational capacity, more-effective collaboration, and so forth. Such outcomes are not easily quantifiable and cannot be measured by aggregating individual-level or program-level inputs, outputs, and outcomes. Information about community-level measures like community capacity and neighborhood cohesiveness are not available through administrative records data (as are health statistics, housing, educational outcomes, or employment outcomes, for example). Instead, the relevant indicators and measures for these kinds of outcomes, which are so central to community change efforts, need to be collected through surveys. Survey data are expensive to collect, process, and analyze, and it is not clear how they can be used to monitor and manage performance.

3. *Indicators of progress are also difficult to measure because CCIs aim for interaction effects and the trajectory of change is often not linear.*

Determining whether an intervention is on target and making progress toward its goals is especially difficult in CCIs because they aim for interactive effects among the broad array of programs and activities that are put in place. In a CCI, it is the combination of programs and

activities across multiple levels (individual, organizational, systemic) and multiple domains of action (human capital development, physical infrastructure, economic development, and others) that is expected to produce changes in community-level outcomes. As a result, the process of change in a CCI is not necessarily predictable or controllable. Progress does not occur as, and cannot be measured by, a series of linear steps or stages. Markers are necessary to indicate whether the desired interactive effects are occurring or likely to occur.

The field has not yet developed a good understanding of what those indicators might be; without them, it will be difficult for performance management efforts in CCIs to go beyond tracking inputs, outputs, and outcomes in separate programs. New efforts to track “collective impact” will shed some light on this dilemma, but the unpredictability of the actions and outcomes in complex, place-based change efforts is increased by two other characteristics of CCIs. First, external factors that are beyond the control of the stakeholders—for example, changes in local policy or local leadership, shifts in labor or housing markets, economic downturns—are likely to affect the ultimate outcomes. High-quality implementation is essential, but will not by itself guarantee success in the long term. Second, changes in community-level outcomes do not happen quickly. The lengthy time frame of change in CCIs further reduces the predictability of the cause-and-effect relationship between inputs, outputs, and outcomes.

4. *A performance management system for CCIs needs to be systematic and disciplined while also allowing for innovation and responding to the unexpected.*

An essential tension in complex, place-based community change efforts is the need to be flexible and adaptive as well as intentional and focused. The same tension plays out in the way people think about performance management in CCI efforts. Some believe that a major advantage of performance management in complex, community change efforts is that it can bring more focus and discipline to work that can otherwise be very “squishy” and unfocused. Others fear that too rigid an effort to manage progress against plan will undermine a CCI’s ability to adapt to changing circumstances and respond to emerging opportunities.

This suggests that the progress of a CCI should be measured not only in terms of whether a neighborhood plan is being implemented as intended, but also whether the intervention is sufficiently responsive to changing circumstances, emerging threats, and new opportunities in the city or the region.

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## Early Lessons on Good Practice

Evidence about effective performance management in CCIs does not yet exist. In the meantime, emerging lessons about managing performance in other types of organizations offer useful guidance for more complex, place-based change efforts such as CCIs.

*Early lessons on good practice: building and maintaining a performance management system*

- *Getting a performance management system in place typically takes from two to six years.* The STRIVE Partnership in Greater Cincinnati, a multi-sector collaboration focused on improving education outcomes, needed two years to produce its first report card. The Providence After School Alliance (PASA), a citywide network of after-school providers, reports that it took a year of training and support to achieve liftoff of its data measurement system, between two and three years to get really good data, and five years to reach full maturity in collecting and using the data for performance management. Even after a performance management system is in place and fully functioning, ongoing maintenance, review, refinement, and training are necessary.
- *At the collaborative level, someone with some authority needs to take responsibility for getting the system in place.* Building and utilizing a performance management system requires resources and staffing as well as time. Within the collaborative, someone with some authority needs to take responsibility for bringing the stakeholders along, keeping them focused and interested, and making certain that the whole system is on track and moving forward. As Karen Walker and colleagues (2012) note, this person may sometimes be a “champion” who inspires other stakeholders; at other times he or she may need to act like a “hammer” to ensure that data agreements are made and organizations remain accountable for the data they are supposed to collect.
- *Stakeholder organizations need incentives to engage in the process of collecting and entering data, ensuring the data are accurate, and using them to improve operations.* Within each stakeholder organization, someone needs to be responsible for collecting and entering the data and checking their accuracy. This function requires staffing and resources. Buy-in at the stakeholder level will be easier when organizations can readily see how the data they collect are useful to their work. Incentives may be especially helpful at the start-up before the value of the data becomes self-evident.
- *Performance management in collaboratives must go beyond the top layer of management and involve staff at all levels.* Performance management needs to occur within each stakeholder organization as well as at the collaborative level. Effective performance management requires multiple networks of people reviewing the data at different levels, both within organizations and across organizations. In particular, line staffs’ knowledge and insights about program operations can be invaluable in interpreting the results and suggesting how improvements might be made or expectations adjusted.
- *Someone who understands both data and communities can be invaluable in helping managers interpret what the data are telling them about their programs.* This role can be played by a staff member, a consultant, or an organization that serves as a “data intermediary.” Local members of the National Neighborhood Indicators Partnership (NNIP), for example, build information systems with local data and facilitate the practical use of data by city or community leaders. Local university departments can also be helpful in efforts to develop and utilize data in organizations and collaboratives.

- *Performance management works best when the practice of using data to inform decision-making becomes part of the internal working culture of an organization.* Organizations become learning environments when they develop feedback loops for sharing information and using it to make decisions. Learning organizations not only encourage staff to build evidence and reflect on what they are doing but also create opportunities and venues for them to do so. Performance management is one formal process for doing this, but its value needs to be reinforced throughout the culture of the collaborative and the institutional culture of each of the stakeholder organizations.

### *Early lessons on good practice: data collection, quality, and use*

New technological resources make it easier for organizations and collaboratives to collect and share the data needed for performance measurement and management. Products and systems like nFocus Solutions, Efforts to Outcomes (ETO) by Social Solutions, and similar commercial data platforms provide opportunities for networks of stakeholder organizations or multi-site initiatives to build and use integrated data systems.

Despite technological advances that make it easier to collect and share data, collaboratives and multi-site initiatives face multiple challenges in their efforts to use data to manage performance. Emerging experience on effective practice suggests the following lessons:

- *Settle on a few well-chosen indicators.* Collecting lots of data is always a temptation. However, asking stakeholders to collect measures and indicators that aren't critical to assessing performance can overload organizations and potentially undermine a performance management effort.
- *Develop written agreements on data collection and use.* Stakeholders should collectively develop written agreements that spell out what data will be collected, by whom, how often, how it will be reported, how verified, and other details. Partners should be held accountable for carrying out the agreement.
- *Develop standardized definitions of key data elements.* Standardized definitions of key data elements in a shared data system are essential to effective performance measurement and management. Otherwise, it will be difficult to compare data or aggregate data across multiple stakeholders. Stakeholders need to determine together, for example, what counts as an enrollee, or what is credited as a program completion. The more definitions that can be agreed to at the outset, the better.
- *Develop procedures to ensure the quality of the data collected and reported.* Using data to inform decision-making is problematic if the data are inaccurate or incomplete. Ensuring the quality of the data can be particularly challenging in systems that rely on self-reported data. Stakeholder organizations need to agree on the procedures that will be undertaken to check and maintain the accuracy of the data they are reporting.

- *Distinguish data for performance management from other (valid) data uses.* Data are collected and used for many purposes in complex, place-based change work. The data used in performance management are only one of the categories of data that collaboratives will be collecting and using for planning and strategic decision-making. For example, data are collected and used for neighborhood visioning and planning purposes, and for galvanizing action by neighborhood residents or outside powers. These are all important uses of data in place-based change. But they aren't the same as using data for performance measurement and management, and they require a different type of data and a different review process.

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## How Performance Management Differs from Evaluation

There is some confusion about how performance management differs from evaluation. Experts who have experience with both performance management and evaluation draw attention to distinctions in purpose, intended audiences, the staff who lead the investigations, the type of data collected, the frequency with which data are collected and reviewed, and the way progress is measured. The key difference is that performance management is used for course correction by managers, while evaluation is used to assess the impact of an intervention. The table below summarizes the differences between performance management and evaluation. However, the line between the two may blur in practice and be less sharp and clear than in theory. For example, many community change initiatives have used what is known as a formative or developmental evaluation to learn more about their programs. A formative evaluation focuses on how a program is being implemented and does not attempt to assess its longer-term effectiveness. This kind of evaluation has more in common with performance management than a traditional impact evaluation does.

|                                     | PERFORMANCE MANAGEMENT   | EVALUATION  |
|-------------------------------------|--|---|
| <b>Purpose</b>                      | Determine whether the program/initiative is operating as intended; guide improvements if not | Assess effectiveness or impact, explain findings, understand process through which program operates |
| <b>Intended audience</b>            | Program managers and staff   | Funders, policy makers, external practitioners  |
| <b>Frequency of data collection</b> | Throughout program life  | Once or periodically  |
| <b>Leaders of review process</b>    | Program staff  | External evaluator  |
| <b>Measures of progress</b>         | Comparison to benchmarks   | Increases or decreases in outcomes  |

Adapted from Walker and Moore, 2011

Nevertheless, there are some important differences between a formative evaluation and a performance management process. Formative evaluations are generally carried out by external staff who are independent third-party evaluators rather than by program staff. The primary audience includes funders and external practitioners in addition to the staff who are operating the

programs. Progress is measured by tracking increases or decreases in the desired outcomes, not by comparing performance against planned benchmarks.

It might be helpful to think of performance management as a process of self-assessment in which the people who are actually operating the program try to figure out how it's going and how performance might be improved.

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## Conclusions and Caveats

Performance management contributes to effective implementation because it sets up a continuous learning and adaptive system. The emerging lessons about how to utilize performance management to improve practice are helpful for all in the business of improving well-being for disadvantaged groups. However, the community change field has not yet produced all the elements of performance management that are needed in complex, place-based work.

In particular, community-level outcomes and measures need to be developed, as do many interim indicators of progress. The lack of measures and indicators is troubling because, as the old adage warns, what gets measured gets done. If community-based collaboratives cannot track key aspects of their work, their operations and performance management systems will be skewed toward other outcomes.

The community change field also needs to develop a better understanding of how to use data to inform decision-making and improve performance, and must build the capacity of stakeholder organizations and collaboratives to do so. Meeting these challenges should be priority areas of investment for supporters of community change agendas.

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## Meeting Participants

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**OUR MISSION:** The Aspen Institute Roundtable on Community Change distills lessons about how to revitalize distressed communities and helps policymakers, practitioners, and funders develop and implement effective strategies for promoting vibrant, racially equitable communities in the United States and internationally.