

Lessons Learned

A supporting document as part the Community Foundations of Canada Poverty Web Toolkit: From Good Causes to Root Causes

Lessons Learned

These learnings come from experienced practitioners, directly from their poverty work. The lessons are a compilation of insight from Hamilton Community Foundation, the Winnipeg Foundation, Vancouver Foundation, Calgary Foundation, Fondation du Grand Montréal, Edmonton Community Foundation, the Annie E. Casey Foundation, and others. Each is at a different stage in their poverty work. These lessons are insights and early learnings – not prescriptions. But as these pioneers break new ground, they are pleased to share their evolving learning with you.

Lessons about Context and Readiness

- There is a link between success and the amount of research and preparation about the local context the foundation undertakes prior to introducing an initiative.
- *Relationships*: Getting to know the players (both professionals and people living with poverty), establishing trust, learning about what organizations and individuals are doing, and creating transparent processes is essential. And it takes time.
- Document why you are taking the position you are. Be explicit about your theory of change.
- Start by thinking about the type of foundation you wish to be. Any decision about your approach should be driven by the foundation's reason for existence – its mandate, vision, mission – or the impact it intends to have. The question of what to support, and how, flows from the foundation's understanding of its motivation and the relationship it wishes to have with the community. Program delivery, learning, or capacity building each involve a different level of commitment.
- Leadership and champions are essential. People with vision, skills and willingness to take calculated risks must champion this kind of initiative. Personalize the issue.
- Taking on a strategic priority such as poverty will place demands on all aspects of the Foundation including the Granting/Program, Donor Engagement, Communications, the Executive, and the Board of Directors
- *Race, culture, class and gender*: Don't be afraid to put these issues on the table, as they underlie many situations. Involve consultants or others to help develop an effective response. This is an important example of technical assistance.
- Provide comprehensive background information to all, including donors, the board and other participants. Research papers become the

centrepiece for convening efforts.

- Take advantage of existing resources, like CFC's principles, social justice framework, poverty toolkit and the national Vibrant Communities network.

Lessons about Strategy

- Take time and think long term. Planning and strategy are key to success.
- Clarify your role(s). There are multiple roles for foundations such as catalyst, funder, and convener. It is important to recognize what each means, when they are appropriate, and how best to accomplish them.
- Being resilient is crucial. When something is not working, be willing to stop and try something different.
- Recognize that knowledge is a strategic asset. The foundation can play an important role in gathering, interpreting and disseminating knowledge on community issues. Become a learning organization.
- *Agreed upon set of clear results:* The clarity about possible results, how to measure (what are our benchmarks), how we will talk to the community and how we will get back to partners helps to keep people focused on achieving the results. This also contributes to helping participants understand the facts that are needed to back up their concerns (not just their feelings) so they can have meaningful conversations with other stakeholders.
- Involve donors and Board every step of the way.
- Work collaboratively with key leaders in the community – find allies and partners with complementary strengths and resources.
- Showcase grantees' work and stories.
- Develop an “exit strategy” early in your planning or implementation. Foundations need an exit strategy for operations and management, but also a sustainability strategy to continue the initiative. Co-investors can certainly help, but start early.
- Resident involvement is critical. How do we involve, engage and build trust with residents? What are the investments we need to make in capacity and skill building, including helping them to make their own case?
- Embedding programs and initiatives in existing local institutions (like libraries, community centres, schools) helps with sustainability.
- Leadership development: plan to turn over leadership, and build in appropriate supports for that, so there is real meaning to the principle of “resident-led”

Lessons about Impact

- Evaluation should be seen as learning about how we are doing and what could be done differently. Learning is not always comfortable
- Measuring success is difficult on issues as large and complex as poverty reduction.

- Change is gradual and it comes from building on strengths and successes.
- All partners in a project (other funders, citizens, grant recipients, others) benefit from a well thought out but “organic” evaluation framework that is based on sound research and includes realistic expectations.
- An evaluation report should serve as a historical record of why an initiative was started, how it evolved, and what it entailed as well as its results and lessons learned
- An evaluation that recommends change can feel “freeing” when it is a catalyst for a better approach.
- Relationship building takes a lot of time, but it brings meaningful contact with residents and the community. It also brings in new donors
- The foundation’s poverty focus has affected other funders – there is more attention to poverty and more consultation and collaboration among local funders
- A poverty focus has made convening a regular part of the foundation's way of working and has brought the foundation new relationships in the community. Convening has been a starting point for many of the foundation’s strongest initiatives. It is often not about funding.
- Convening and co-convening requires you to look at differences and create a forum for honest respectful dialogue.
- Successful convening can raise expectations and become high-profile. Government and other funders may begin to ask the foundation to convene on specific issues.
- Unintended consequences: not all stakeholders identify problems and solutions in the same way. Be aware of negative, unintended consequences of your strategy.

Other Lessons Learned

- Invest in capacity building: organization, staff, and community capacity.
- Participate in learning resources like Vibrant Communities pan-Canadian learning network and CFC’s social justice learning group
- Identifying “deep drivers for change” – like a focus on education, jobs and regional growth – helps the foundation focus strategically. This approach needs to keep to a small number of drivers that rest on reliable data.
- Communication: you have multiple audiences. What are the approaches, products, strategy for each? What are the results to share?
- Power role of funders: Recognize the power dynamic and when to use it appropriately in a way that moves the agenda and the partners forward.