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Anna Pond  
*Anna Pond Consulting*

Seema Shah  
*COMM/VEDA Consulting*

Elizabeth Sak  
*Cricket Island Foundation*

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# Cricket Island Foundation: A Case Study of a Small Foundation's Impact Assessment

Anna Pond, M.P.A., Anna Pond Consulting, Seema Shah, Ph.D., COMMIVEDA Consulting; and Elizabeth Sak, M.B.A., Cricket Island Foundation

*Keywords: Impact assessment, small foundations, philanthropy, youth, organizational development, learning*

## Introduction

When people think of philanthropy and impact, it is common to envision institutionalized philanthropy: the independent foundations with office suites, an established staff, boards selected for their content expertise, and well-established giving strategies and guidelines. We sometimes neglect to imagine the smaller foundations, many of which are founded by well-intended families. Yet family foundations represent a significant part of the philanthropic ecosystem, comprising more than half of all private (family, corporate, independent, and operating) foundations and, with more than \$400 billion in assets, about 46 percent of all foundation holdings (Foundation Center, 2014).

Founded in 2000 following the sale of a family business, the Cricket Island Foundation (CIF) is a small family foundation with assets of approximately \$44 million and annual grantmaking of about \$2 million. Its mission is to develop the capacity and commitment of young people to improve their lives and communities. Family members involved with the foundation are highly engaged and have woven a strong ethos of learning into their philanthropic efforts.

Following its 15th anniversary, the CIF board was eager to learn more about the outcomes of its approach and identify ways to strengthen its impact, particularly as it was expanding its work from New York City, New York, and Chicago, Illinois, into a third city, New Orleans, Louisiana. The board commissioned an independent consultant to undertake a multimethod assessment of the CIF's grantmaking portfolio, both to look back on its impact and to inform future decision-making and strategy. The board

## Key Points

- In 2015, the Cricket Island Foundation conducted a multimethod assessment of its grantmaking portfolio to examine its impact and inform future decision-making and strategy. The foundation, which supports youth-led social change using a cohort-based model, focuses on emerging and medium-sized organizations and provides capacity-building supports to help organizations achieve greater organizational sustainability.
- The assessment focused on two of the foundation's three cohorts and found positive trends in five key areas of desired impact: organizational capacity, youth leadership, nonprofit executive leadership, grantee collaboration and learning, and funder policy and practice. The assessment also identified areas for improvement to strengthen future impact, and prompted a review and update of the foundation's ongoing protocols for tracking its progress.
- This article will explore what was learned from a model of providing long-term capacity-building investments to grassroots organizations, and discuss the ways in which even small foundations can implement meaningful assessment protocols while minimizing data-collection burdens on grantee partners.

was clear that the assessment was intended to turn the mirror on the foundation itself — the goal was to examine and understand the ways in which the CIF's approach resulted in desired outcomes, rather than evaluating individual grantee partners per se. In addition, as a small family

foundation with a small number of grantees that are all emerging grassroots organizations, it was important to conduct the assessment in a manner that was manageable for both the foundation and its grantee partners.

This article explains the assessment methodology, examines the results of the assessment, and describes the steps the foundation has taken to integrate its findings. In doing so, it provides a case study of how a small foundation, with modest resources, can engage in an organizational learning process through assessment and build a culture of inquiry to help understand its impact over the long term, without engaging in an expensive, labor-intensive evaluation.

### The Foundation and its Grantmaking

The Cricket Island Foundation was created in part to inspire a spirit of philanthropy within the donor's family. Its board consists of three generations of family members who live across the United States, and currently involves 15 family members and their spouses. Although the configurations have shifted over the years, the staff typically has consisted of a full-time executive director and program officer, as well as two part-time staff who support programs, operations, and finance. The CIF supplements its capacity with a small cadre of consultants, some of whom work with place-based cohorts and others who are engaged as particular needs arise.

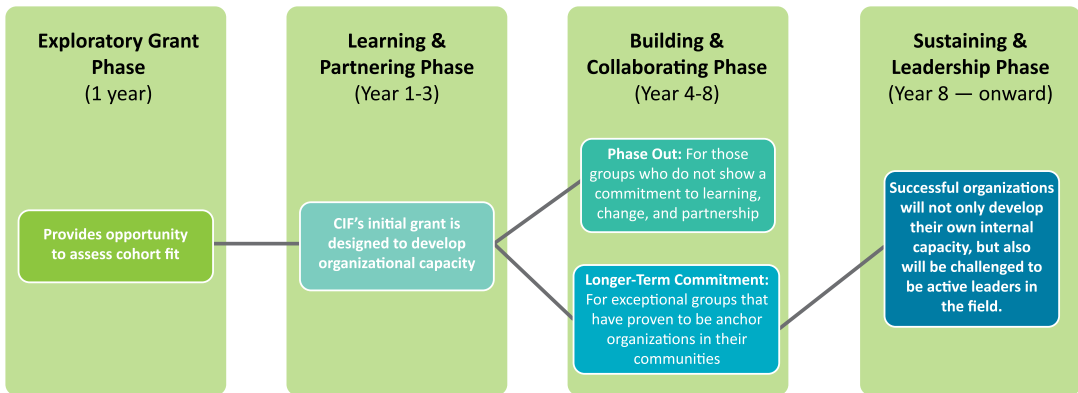
Since its inception, the foundation has been passionate about its commitment to youth. Over time, it has evolved from awarding ad hoc grants to youth development and youth organizing groups across the country to a more focused grantmaking strategy. In 2007, the CIF adopted an organizational development and capacity-building lens to its work, with an emphasis on awarding multiyear, general operating support grants. Importantly, the foundation targets emerging and medium-sized organizations, typically with budgets of less than \$1.5 million, as the trustees believe these are the organizations best positioned to benefit from investments in organizational development. The CIF intentionally occupies a space in the philanthropic ecosystem where it supports smaller, emerging

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organizations. It focuses on capacity building and organizational development because it believes that stronger organizations have deeper impact. The belief that stronger organizations strengthen the field of youth-led organizing is central to the foundation's approach.

In 2009, the CIF's grantmaking shifted toward a cohort-based funding model, a decision rooted in the belief that investing in a critical mass of groups in a specific place and creating opportunities to promote collaboration and learning among them can advance broader field-building efforts. The foundation established its first cohort of grantee partners in 2009 in Chicago; it formed a New York City-based cohort in 2012 and, shortly thereafter, a third cohort in New Orleans. Its initial grants in New Orleans were

**FIGURE 1** Cricket Island Foundation's Phases of Funding



exploratory grants designed for the CIF to get to know the groups and assess their readiness to benefit from the foundation's organizational development focus, and the New Orleans cohort was formally established in 2014. The foundation strives to build connections with local funders and other community stakeholders to ensure that it is attuned to local dynamics and is working in alignment with others in the field of youth-led social change.

*Grantmaking Strategy*

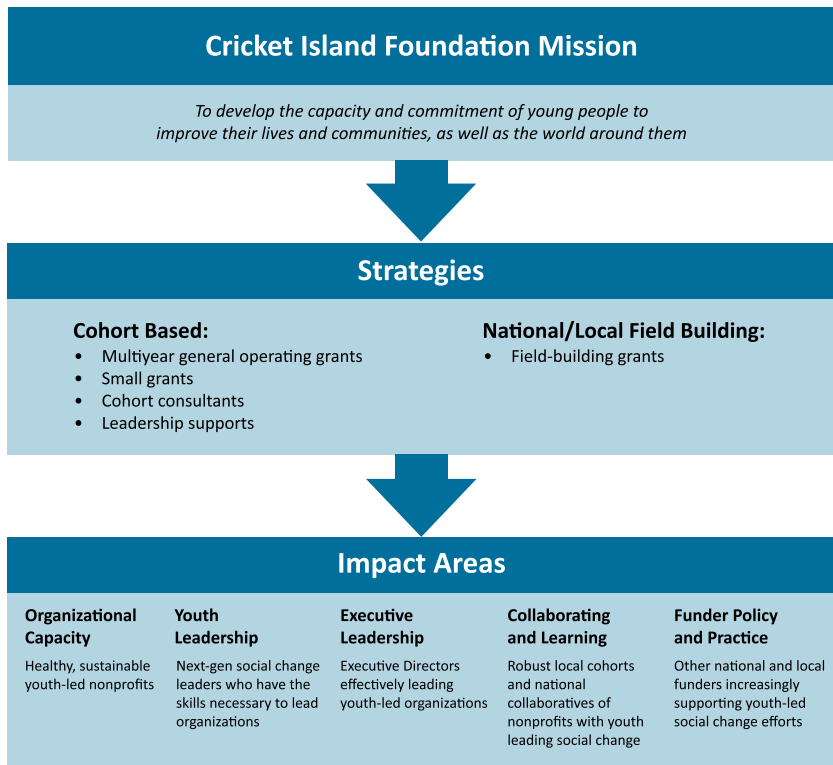
The Cricket Island Foundation's grantmaking consists of financial and in-kind support that helps facilitate cohort collaboration and progress toward organizational development goals:

- **Multiyear general operating grants.** The CIF provides general operating grants to the grantees in each of its cohorts. Grants are typically around 10 percent of the organization's annual budget, ranging from \$20,000 to \$100,000, and are generally awarded for eight to 10 years. In the initial phases, the emphasis is on learning and partnering with other members of the cohort. By the fourth year, the focus shifts to building and collaborating, and in the final phase, the CIF steps down its support as grantee organizations establish greater sustainability. (See Figure 1.) Each year, grantee partners in collaboration with foundation staff establish organizational capacity-building goals related to board development, succession planning,

financial health and sustainability, and staff development, among other areas. Using a multiyear grantmaking model signals a longer-term commitment by the CIF, helps establish deep and trusting relationships with grantee partners, and provides the broader time frame necessary to make progress toward organizational development and capacity-building goals (Independent Sector, 2016). At any given time, the foundation is supporting 20 to 22 grantee organizations across the three cohorts.

- **Small grants.** To complement the larger grants, the foundation provides a set of small grants to support capacity-building initiatives, leadership development, and unexpected needs that may arise during the year. Each grantee partner is eligible for an additional \$11,000 each year to support activities that are aligned with its organizational capacity-building goals. For example, funding could be requested to hire a consultant to support the development of a strategic or communications plan, or to send youth leaders to a national conference of youth community organizing activists.
- **Field-building grants.** In addition to the grants it provides to small, grassroots organizations, the CIF allocates about \$200,000 a year to support collaboratives, infrastructure groups, and initiatives that help build the field of youth-led social change. This

**FIGURE 2** Cricket Island Foundation Theory of Change



allows the foundation to invest in efforts that engage it with the broader ecosystem of philanthropy, including larger foundations. The CIF devotes considerable staff time to advocating for grantee partners and for the broader field of youth-led social change. Recent grantees of this fund have included national collaboratives, such as the Communities for Just Schools Fund and the Funders' Collaborative on Youth Organizing, as well as local initiatives, such as the New York City Youth Funders Collaborative.

- Local cohort consultants. Staff and youth from grantee organizations within each cohort work with a local consultant who facilitates quarterly cohort meetings for collective peer learning and provides individual technical assistance and coaching to groups to advance their organizational development goals. Using a local capacity-building and organizational development

expert allows the CIF to support grantee partners more fully with an additional resource beyond foundation staff.

- Leadership development support. In recent years, the foundation has offered grantee partners a variety of opportunities to support executive leadership development and transitions. In 2015, it created the Leadership Circle as a pilot effort for new executive directors, hiring two consultants to facilitate group meetings and provide one-on-one coaching. More recently, the CIF offered to pay for individual coaching support for all executive directors who wished to participate.

*Theory of Change*

The Cricket Island Foundation's theory of change focuses on five key areas of desired impact: (See Figure 2.)

**TABLE 1** Cricket Island Foundation Cohorts

Cohort	Grantees Since	\$ Invested	No. of Grantees
Chicago	2009	\$3.2 million	7
New York	2012	\$2.5 million	7
New Orleans	2013	\$ 250,000	5

- organizational capacity, with a desire to see grantees become healthy, sustainable nonprofits;
- youth leadership, with an aim of supporting the next generation of social change leaders who have the skills necessary to lead organizations;
- executive leadership, with a goal of helping executive directors develop effective leadership practices;
- cohort-based collaboration and learning, with the goal of contributing to a robust national network of nonprofits with youth leading social change; and
- funder policy and practice, with the desire to see a national network of funders who are increasingly supportive of youth social change efforts and adopting more grantee-centered processes.

**Assessment Approach**

The external evaluation consultant collaborated with a dedicated working group of board and staff members over an eight-month period in 2015 to design the assessment, identify questions of interest, collect and analyze the data, and review the results. The assessment focused on its Chicago and New York City cohorts; the third cohort, in New Orleans, was formally initiated in 2014 and at the time of the evaluation it was too soon to examine impact. (See Table 1.)

The foundation was cognizant of creating an assessment methodology that was proportionate to its size and, as a relatively new foundation, its stage of organizational development. Using its general theory of change connected to key impact areas as a guide, the CIF worked with the consultant to overlay assessment instruments to gather data in those areas. For a small foundation where every dollar going to grantees counts, the trustees did not want to spend large amounts of money on assessment; instead, it opted to use existing data, such as qualitative reports from cohort consultants and past survey responses from grantees, and supplement with additional data from focus groups and interviews for nuanced information about the cohort members’ experience with the foundation. In addition, the assessment was designed to be relatively low-impact on grantees, so as not to burden them with multiple requests for data.

Four data sources informed this assessment:

- survey results from a tool focused on organizational capacity (Chicago – 2009, 2013),
- qualitative reports on cohort progress (Chicago – 2013, 2014),
- financial health indicators from IRS Form 990 (Chicago and New York City – 2011–2014), and
- transcripts from focus groups and one-on-one interviews with grantee partners (seven in Chicago and eight in New York City – 2015).

### Organizational Capacity Survey

In 2008, in partnership with an assessment expert, the foundation created a customized organizational capacity assessment tool adapted from TCC Group's Core Capacity Assessment Tool.<sup>1</sup> The CIF's tool covers 12 organizational capacity domains and is completed by multiple stakeholders, including staff, board, and youth, to identify organizational capacity-building needs. The domains are mission, planning, leadership, board, fundraising and financial management, evaluation, program development, communications and marketing, technology, staff development and sustainability, human resources, and alliances and collaboration.

In Chicago, representatives of five grantee organizations took the survey twice — in 2009 (n = 43) and again in 2013 (n = 83), allowing for comparative analysis. To account for the fact that some questions changed significantly between the first and second surveys, analyses focused on questions common to both surveys. Thus, the assessment focused on nine of the 12 organizational capacity domains. The three domains not examined in the assessment were board, technology, and alliances and collaboration.

### Qualitative Progress Reports

Local cohort consultants provided two major reports — one in 2013 on the five existing grantees and another report in 2014 on the two new grantees — that detailed progress toward building grantee organizational capacity. The 2014 report includes a ranking of organizational development capacities on six key dimensions (program development, alliances and collaboration, leadership, fundraising and financial management, board, and planning) according to three levels of functionality: high, medium, and low.

### IRS Form 990

The evaluation consultant reviewed available 990s of Chicago and New York City groups from 2011 to 2014 to examine data related to organizational financial health. Although several years of

data were reviewed, the intent was less to assess for linear trends, which would be unlikely given the small size of organizational budgets, than to get a pulse on overall financial health.

Moreover, because more and more foundations, as well as agencies such as Guidestar and Charity Navigator, are using 990s to assess organizational finances, examining 990s was a way to determine whether the foundation wanted to integrate a review of 990s into its practices as an “early warning system” to determine if organizations might be at risk for financial trouble. The following indicators, considered good measures of organizational financial health, were examined: change in unrestricted net assets or operational surplus/deficit, functional expenses breakdown, months of and total liquid unrestricted net assets, and months of and total cash on hand (Kotloff & Burd, 2012).

### Limitations

There are several limitations to keep in mind when reviewing the results. Although an independent consultant was hired to conduct the evaluation, some grantee partners may have still felt compelled to offer positive feedback in focus groups and interviews, knowing the information could potentially be shared with the foundation despite assurances of confidentiality.

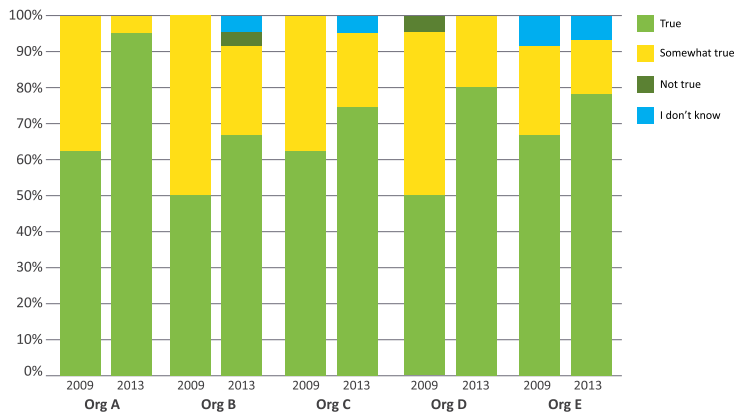
In addition, due to the small number of grantee partners, surveys and other quantitative measures have a small sample size, meaning that averages could be easily skewed due to outliers. To address this, data were reviewed carefully for any skewed data that might influence overall averages.

With respect to financial health data, there is debate as to whether the IRS Form 990 is the ideal source of information, given that data are self-reported by nonprofits and provide relatively limited information. Audited financial statements, prepared by independent third-party accountants, provide more detailed and objective financial information. That said, the foundation

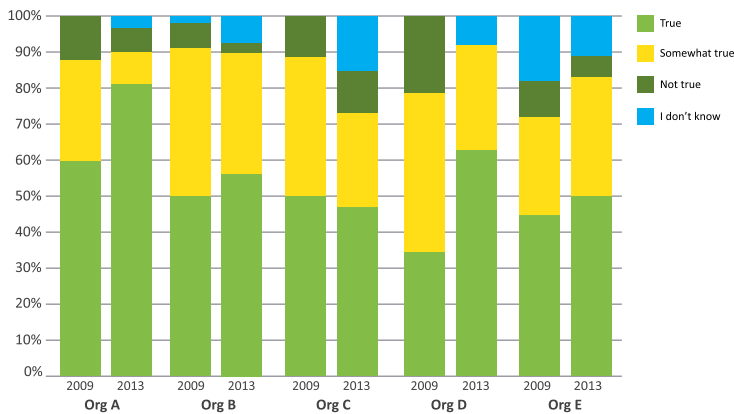
<sup>1</sup>The Core Capacity Assessment Tool (CCAT) is a 146 question online, survey-based tool that measures a nonprofit's effectiveness in relation to four capacities — leadership, adaptability, management, and technical capacities. Additional information about the tool is available at <https://www.tcccat.com/hc/en-us>.



**FIGURE 3** Mission Capacity Among Chicago Cohort Members: 2009 and 2013



**FIGURE 4** Staff Development Among Chicago Cohort Members: 2009 and 2013



and external consultant wanted to minimize data requests and have consistent data across grantees. Since not all grantee partners (due to their small budgets) were required by law to conduct financial audits, the 990 was the only way to analyze financial health data consistently across grantee organizations.

Another limitation is the inability to account fully for context — other donor interventions, changes in the operating environment, etc. — that could have an impact on outcomes of interest, such as organizational capacity or leadership. During the interviews and focus groups, participants were asked for attribution to mitigate partially against this reality.

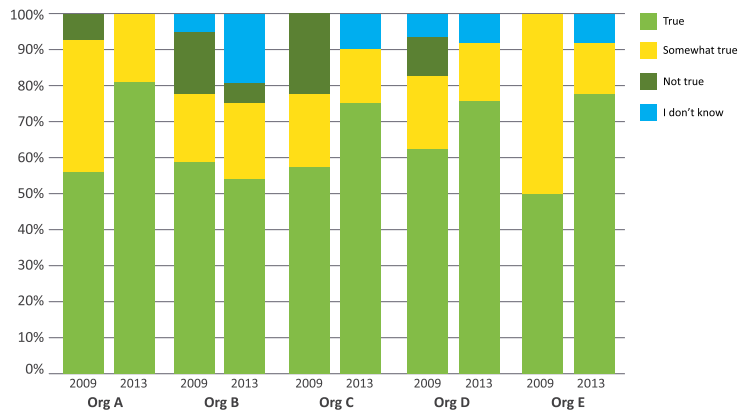
## Findings

Data analyses found the most robust positive trends in organizational capacity, executive leadership, and youth leadership. There were also positive trends in cohort collaboration and additional learning and funder policy and practice, but these were more challenging to assess, and more work needs to be done in the future to examine impact in these areas.

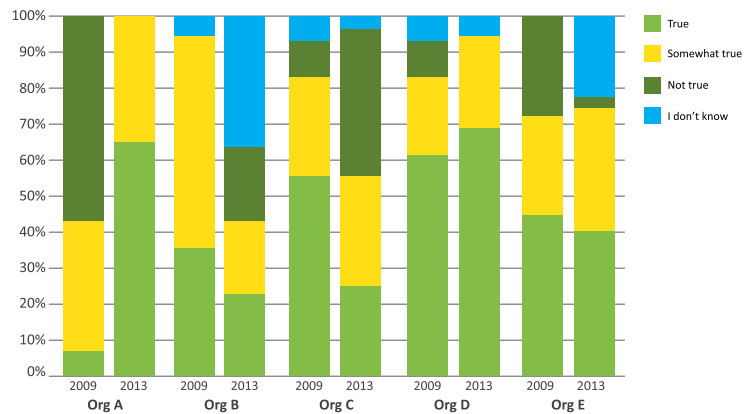
In reviewing the findings, it is important to note what is unique about the types of organizations the CIF targets with its grantmaking. These are youth-led organizations, engaging young people programmatically and operationally in



**FIGURE 5** Communications/Marketing Among Chicago Cohort Members: 2009 and 2013



**FIGURE 6** Planning Capacity Among Chicago Cohort Members: 2009 and 2013



leadership roles. As locally focused organizing and policy advocacy organizations engaged in programs and campaigns responsive to community issues, they need to be nimble to adjust as constituency issues evolve. Organizationally, they operate with smaller budgets, generally leaner staff, and typically younger staff. These factors were considered as the evaluation consultant and the foundation interpreted its findings. The following section describes results in each area in greater detail.

### Organizational Capacity

Between 2009 and 2013, all Chicago grantee partners reported increased mission capacity

— having a clear, concise mission that staff, youth, and board members know, discuss, and review. (See Figure 3.) Most members of the Chicago cohort also reported progress in staff development and in communications/marketing (See Figures 4 and 5.)

Findings related to human resources and evaluation were mixed, with only three of the five organizations reporting improvement. In the area of strategic-planning capacity, two of the five organizations reported improvement. (See Figure 6.) This may have been because several organizations were in the process of creating three- to five-year plans but had not yet begun

*[G]rantees in focus groups shared how the foundation’s long-term funding allows for authentic conversations on capacity building that are substantive rather than superficial. As one grantee observed, “We see a lot of other funders interested in capacity building, but they don’t commit long term. It’s hard in only a year or two to make real capacity gains.”*

implementation, which may have translated into perceiving a lack of capacity.

In fundraising and financial management, two organizations reported a significant gain in capacity and another reported a decrease in capacity, while the others showed little to no change. In the area of leadership, baseline ratings in 2009 were high (more than 90 percent of respondents responding “true” or “somewhat true”) for all grantees and remained so in the 2013 survey. Similarly, for program development, baseline ratings were high in 2009 and stayed that way in the 2013 survey.

An analysis of liquidity — what many nonprofit experts consider the most important indicator of financial health — showed that all but one grantee had positive liquid unrestricted net assets. The majority of Chicago and New York City grantees had two to six months of liquid reserves across the four years of data that were examined. Chicago grantees had between 2.5 months and 5.8 months of cash reserves in 2014, with New York City grantees having a similar range (1.6 months to 5.5 months) during the same

year. Within the time period, there were no clear patterns — liquidity increased for some organizations from 2011 to 2014, while it decreased for others within the same period. This is to be expected given small organizational budgets, but that most organizations maintained recommended levels of cash reserves is promising. Again, the purpose of examining 990s for this assessment was to determine if there were any early warning signs of potential financial trouble.

Most grantees had no change in unrestricted net assets. When compared to the data from the Nonprofit Finance Fund’s 2014 *State of the Sector Survey*, this places the CIF’s grantees in line with the 31 percent of national nonprofits that reported break-even financials in 2013 (Nonprofit Finance Fund, 2014). Moreover, most are faring better than the 28 percent of national nonprofits that reported operating at deficits in 2013. The functional expenses breakdown showed that Chicago and New York City grantees generally report a healthy balance; overall, they fall within the Better Business Bureau Wise Giving Alliance’s recommended range for program expenses (65 percent-plus) and fundraising expenses (well below 35 percent) (Better Business Bureau, 2018). Although these points of comparison are not ideal, given that they reference larger, national organizations rather than the small, grassroots organizations that the CIF supports, they provide a benchmark nonetheless and suggest that though these organizations are small, they are managing to maintain a level of sustainability with their finances.

Coupled with this examination of quantitative data, grantees in focus groups shared how the foundation’s long-term funding allows for authentic conversations on capacity building that are substantive rather than superficial. As one grantee observed, “We see a lot of other funders interested in capacity building, but they don’t commit long term. It’s hard in only a year or two to make real capacity gains.” They noted that the CIF’s impact is cumulative. Many in both Chicago and New York City described how its general operating support and small grants for capacity building built on each other to provide sustained support for organizational

development needs. Grantees in Chicago noted how foundation cohort meetings and retreats provided them with a unique space to talk about capacity building across their organizations and helped them prioritize capacity-building work.

### *Youth Leadership*

Across cohorts, foundation support built grantees' structural capacity to engage youth and build their leadership skills. This direct impact on youth leadership was somewhat unexpected, given that the CIF's support of youth leadership tends to occur indirectly via grant support.

Qualitative and quantitative data showed that these capacities were built through organization-level experiences the foundation funds, as well as via cohort-level activities like financial management and other organizational capacity-building trainings. The Chicago survey results show that all grantees offer a variety of hands-on learning opportunities for youth to develop their skills as potential organizing and movement leaders, such as grassroots campaigns to improve local policy on issues ranging from food justice to school-to-prison pipeline reform. These grantees also engage youth regularly in their alliances and collaborative work, exposing youth to opportunities for networking and communicating directly with local, regional, and national community leaders.

Chicago local consultant reports showed, and foundation staff corroborated, that grantees provide youth with multiple opportunities to learn about and even influence organizational practices, from engaging them in hiring processes and program development to having youth on their boards. These opportunities have increased since 2009, as have opportunities for youth to access professional development. Participation in the cohort and cohort-funded activities has helped youth build skills and grow as leaders.

Chicago focus group participants noted how youth participation in cohort-based trainings on topics like financial management helped them gain analytical skills to understand how their success in movement-based work is fundamentally connected to their skills as operational leaders

who can effectively manage and execute based on limited resources. Some New York City grantees pointed to grants that they said helped them connect youth to larger networks of youth activists, which contributed to their leadership development. "Our youth group really became strong because of Cricket Island Foundation," said one grantee. "Through a combination of [the foundation's small grants] and local consultant trainings, the youth developed both their analytical capacities and organizational leadership skills."

### *Executive Leadership*

In addition to 2013 survey data showing that grantees perceive that their organizations are led by individuals with vision and good relationships with community leaders, focus group and interview data affirmed that executive leadership had been strengthened, with grantees crediting the foundation's grantmaking and cohort workshops.

Many focus group participants also noted the value of the foundation's Leadership Circle program. At the time of the assessment the program was a pilot initiative, created as a 12-month program and staffed by leadership development consultants, to support new executive directors. Based on focus group and interview data, the Leadership Circle created a confidential, safe space with trusted peers and helped develop soft skills, such as self-awareness and relationship-building, of emerging leaders. In Chicago and New York City focus groups, executive directors discussed the value of being in a space with other social justice organizing leaders — how such leadership is unique and how connecting with others doing this work across cities built their knowledge and connections to other movement leaders.

In particular, the focus on building emotional-intelligence skills helped leaders identify strategies and techniques for managing the frustration, disappointment, self-limiting beliefs, and fear and uncertainty that sometimes impact the ability to exercise effective leadership and manage conflict. Participants also noted other modules, such as those on power dynamics, peer coaching, and receiving 360-degree assessments from staff, board, and allies, as beneficial. Said one

*The foundation's greatest learning impact may be in helping to align knowledge and perspectives of internal organizational stakeholders on capacity issues. Chicago focus group participants discussed the merits of having staff, board, and youth attend CIF workshops. Involving other organizational leaders, beyond executive directors, helped grantees stay focused on capacity-building priorities within the organization and build a shared understanding of how to move forward on organizational development goals.*

participant, "I've been to other leadership trainings. This is different. It's helping me own my strengths. I'm developing greater emotional intelligence and trusting in that."

According to focus group participants, the clear curriculum structure and expectations made this program successful. From a curricular perspective, participants mentioned the valuable combination of facilitated sessions on leadership skills and techniques, peer coaching, and follow-up on executive coaching.

#### *Cohort Collaboration and Learning*

According to interview and focus group data, CIF funding helped foster greater collaboration

and peer learning among cohort members through its quarterly cohort meetings. Chicago focus group data showed that learning workshops provided adaptable tools and deepened knowledge about how to approach capacity-building issues inside grantee organizations. Importantly, focus group participants noted how these workshops offered content relevant to small social justice organizations, such as how to stay values- and mission-focused as community movement builders.

One of the most notable findings: The foundation's greatest learning impact may be in helping to align knowledge and perspectives of internal organizational stakeholders on capacity issues. Chicago focus group participants discussed the merits of having staff, board, and youth attend CIF workshops. Involving other organizational leaders, beyond executive directors, helped grantees stay focused on capacity-building priorities within the organization and build a shared understanding of how to move forward on organizational development goals. "At the most recent workshop, which focused on values and mission, we had staff, board, and youth attend," said one participant. "What they learned has framed conversations we have had subsequently internally."

Focus group data has also showed that the foundation has planted the seeds in Chicago for more peer learning on organizational capacity via cohort meetings. According to participants, although many of the groups in Chicago had connected with one another on tactical campaigns, they typically did not come together to discuss issues related to fundraising, board development, or communications. As one grantee shared, "Cricket Island Foundation offers a unique space for us to connect. With all other tables, we're focused on campaigns and issues." Grantees discussed the value of digging in on the technical aspects of organizational development and then hearing from each other about what they are struggling with and what they are doing to build organizational capacity. Through the cohort, organizations in Chicago were able to develop a shared funding proposal for collaborative work and coordinated communications activities. While groups offered praise

for the current workshop approach, grantee partners felt the peer-learning potential could go even further to promote shared learning and collaboration. Grantees agreed they would benefit from more direct peer exchange, reflecting on their models of youth-led work, and what successes and challenges they've experienced in engaging youth as leaders.

### *Funder Policy and Practice*

In addition to its support for grassroots youth organizing groups, the foundation also provides support to entities that help build the field of youth-led social change through its Field Learning Fund. As part of its theory of change, the CIF operates on the belief that it can use its voice to advocate for youth-led social change, as well as more grantee-centered funding practices, with its peers. Specifically, it encourages peer funders to consider multiyear general operating support grants as well as support for organizational capacity-building approaches. Although the assessment focused primarily on input from grantee partners in New York City and Chicago about their cohort experience, it also took a preliminary look at the extent to which the foundation influenced youth funding locally and nationally and helped shift other funders toward capacity building.

As a starting point to assess the CIF's field-building work, the consultant mapped the foundation's current grantmaking approach to field-building "best practices," identified in the philanthropy literature, including those noted by the Bridgespan Group in its 2009 report on how funders successfully build fields (James Irvine Foundation, 2009). This mapping showed that the CIF already employs many of these best practices, including helping to foster a shared identity via its cohort-based work, providing support for leadership development, and focusing on long-term general operating support grants. At the same time, its work around research and communications — two additional components of field-building practices — is fairly limited and represents opportunities for further growth.

Foundation staff also identified about 40 foundations that support youth-led work nationally as

well as locally in Chicago, New York City, and New Orleans, and mapped its connections to this group of funders. This mapping illuminated two findings: fifteen of these funders (seven national, eight local) already support two or more CIF grantees, and the foundation is already connected to 34 of these funders via the eight collaboratives and affinity groups through which the CIF currently holds membership.

Staff then reflected on ways they have exercised influence via these collaborative and affinity groups: for example, the CIF influenced the evolution of the Communities for Just Schools Fund and the Just and Fair Schools Fund donor collaboratives. In partnership with other collaborative members, the foundation worked to develop an increased focus on capacity building, in part through the creation of a \$200,000 capacity-building pool. In addition, it was able to introduce many of its grantee partners to the work of the Communities for Just Schools Fund, many of whom ultimately became grantees of the fund. The foundation has also used its leverage as a national funder to convene local funders in Chicago and New Orleans to discuss the value of youth-led social change, social justice funding, and other issues affecting its grantees. For example, staff helped five grantees secure local youth development funding in New York City and Chicago.

While these reflections are mostly anecdotal, as the foundation moves forward with its assessment work, it plans to examine its efforts to influence funder policy and practice — specifically its ability to funnel more dollars towards youth-led social change and its advocacy for more grantee-centered practices — in a more systematic and methodical way.

### **Lessons Learned and the Path Forward**

Based on the assessment, foundation board and staff learned valuable lessons about what was working well and areas for improvement in its grantmaking practice. In addition, this comprehensive assessment prompted conversations about how to integrate assessment into the day-to-day work of the foundation to facilitate ongoing learning, feedback, and course correction.

*Though leadership development is considered one of the most important components of building a strong field, it is an underfunded enterprise, especially for the types of groups the foundation supports. Following the assessment, the CIF expanded its pilot efforts related to the Leadership Circle, which showed robust outcomes, sponsoring a second iteration of the program to develop executive nonprofit leadership and cultivate a shared identity/network among grantee partners.*

Critically, foundation leaders learned they could cost-effectively track impact by building on assessments in place, systematizing them, and adding a few other regular assessments into their practice — instead of paying expensive consultants to develop complicated methodologies that generate reports to sit on shelves rather than offer continuous data to improve the foundation's work.

#### *Lessons for Grantmaking Practice*

The positive results from this assessment underscore the efficacy of the CIF's grantmaking model and also offers opportunities to deepen this work. The foundation will continue to make general operating support grants, supplemented

by smaller grants for capacity building and leadership development, while also running local workshops on capacity-building topics for grantee staff, board, and youth.

Though leadership development is considered one of the most important components of building a strong field, it is an underfunded enterprise, especially for the types of groups the foundation supports. Following the assessment, the CIF expanded its pilot efforts related to the Leadership Circle, which showed robust outcomes, sponsoring a second iteration of the program to develop executive nonprofit leadership and cultivate a shared identity/network among grantee partners. In addition, the foundation has supported one-on-one coaching for grantee partners and continues to explore various ways in which leadership support for grantees can be integrated into its work.

While cohort members appreciated the ability to come together with their peers, the foundation also received feedback from grantee partners that they wanted greater opportunities for peer exchange. Since the assessment, cohort meetings have been restructured to give the grantees full ownership of the agenda of the meetings, part of which includes developing a collaborative annual plan (or shared learning goals). In addition, the foundation has started providing more funds to support collaborative cohort work to facilitate deeper connections and shared work among cohort members.

Moreover, the CIF has tweaked its approach to working with cohort consultants so they can better support grantee partners. Following the assessment, the foundation created a consultant template to use across cohorts to ensure there is more consistency in how consultants support cohorts across different cities. It has also implemented regular consultant calls to hear updates, strategize about the work, and share ideas that can be used across locales. This, too, has fostered more peer exchange with cohort members in different cities, a process that has been facilitated by the consultants who have become more familiar with the work happening in other CIF cities.



### Assessment Approach

The assessment process underscored the fact that expanding the CIF's capacity to understand impact would require developing an ongoing culture of assessment internally. Following the assessment, the foundation added staff capacity related to assessment and reviewed its assessment and reporting practices to create greater alignment. Specifically, it introduced several new assessment tools, such as a periodic cohort consultant survey, to create mechanisms for getting regular feedback related to collaboration and learning outcomes. In addition, it streamlined reporting requirements to align better with areas of desired impact and now asks grantees to share existing media, news coverage, etc., that demonstrate impact. This minimizes reporting burdens for grantee partners, while also better allowing the foundation to procure content for its communications efforts.

Expanding assessment has many implications, not the least of which impacts staffing roles and use of consultants. This is especially true for a small foundation with modest resources. The CIF has made decisions about what to put in place immediately, what to put in place over time, and how staff roles will need to be modified for implementation. Phasing in assessment practice in manageable doses makes the framework more doable and prevents the staff from wading through data that do not help increase the foundation's impact and effectiveness.

Board members and staff came to realize that communications would be another way to deepen their impact and advance the goal of building the field of youth-led social change. Since the assessment, the foundation has identified strategic ways to spotlight how grantees authentically engage young people as leaders, sharing their stories of impact. It developed a communications strategy, established a presence on social media, and targeted key philanthropic conferences to be able to share best practices more effectively. The foundation will also explore how this connects to its work influencing other funders (e.g., ramping up the CIF's speaker/panel engagements, blogging, etc.) to change funder policy and practice.

Capturing the foundation's influence as part of its field-building efforts is not easily measured, and the current assessment examined this area through cursory and anecdotal means. In the future, the CIF will develop a more robust, systematic mechanism for assessing its work around funder policy and practice, perhaps through periodic interviews or surveys with collaborative partners to garner nuanced understanding of its advocacy efforts.

The foundation is also reflecting on how values of trust fit in with more rigorous assessment practices. One of the CIF's core values is to be grantee-centered. This includes streamlining grantmaking and administrative processes and communicating a sense of trust and partnership, even within the power dynamic of a grantee-funder relationship. As the foundation adopts a more rigorous assessment approach, it is still grappling with how to collect information without placing too much of an administrative burden on grantee partners. The CIF has developed a process of data collection that strives to strike that balance, but feedback from grantee partners will be critical to assessing the extent to which that balance has been achieved.

### Conclusion

The results of the impact assessment provide valuable insights to foundations that may be considering similar capacity-building approaches. In addition, this article serves as a case study showing how a small foundation can use existing data, complemented with focus groups and interviews, to develop a better understanding of its work. For minimal investment and adjustments (part of a staff person's time, streamlined reporting that aligns with assessment goals), the board and staff now have data to help them improve their impact. As a return on investment, this helps the Cricket Island Foundation stay on mission, while also sharing important learnings with others in philanthropy about this grantmaking approach and ways in which it can be improved.



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**Anna Pond, M.P.A.**, is principal of Anna Pond Consulting.

**Seema Shah, Ph.D.**, is founder and principal of COMM|VEDA Consulting.

**Elizabeth Sak, M.B.A.**, is executive director of the Cricket Island Foundation. Correspondence concerning this article should be addressed to Elizabeth Sak, Cricket Island Foundation, 77 Bleecker Street, Suite C2-14, New York, NY 10012 (email: [liz@cricketisland.org](mailto:liz@cricketisland.org)).