Literature Review:
Considerations for Place-Based Investing That Leads to Impact

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Executive Summary

Foundations across the country, both those who work nationally and those who focus on specific communities, have a long history of engaging in place-based work.[1] Place-based initiatives have historically used a comprehensive set of strategies to address the multifaceted needs of a specific place and have typically defined that place based on preexisting geographic boundaries of some sort.[2] While place-based initiatives have been used as an investment approach by funders for decades, recent years have seen a new wave of interest and flow of resources from funders toward place-based initiatives.[3]

This literature review aims to provide an overview of knowledge from the field centered around definitions and understanding of place, key principles for place-based grantmaking and considerations for implementation of a place-based funding approach.

Our review of literature uncovered the following key ideas:
- Funders often choose to take a place-based approach because they want to **concentrate resources** and **increase the impact** of their funding within a specific location where they have a connection.
- Place can be defined by and understood based on a number of factors including **geographic**, **political**, **cultural** and **contextual boundaries**. In practice, funders focused on social impact have defined place primarily in terms of distinct **pre-mapped geographic boundaries** at the neighborhood, city or regional levels.
- **Key principles** in place-based grantmaking include community engagement, mutual learning, shared ownership, systems understanding, transparent communication, race, inclusion, diversity and equity and a long-term commitment. By adhering to these key principles, it is more likely that place-based investments will lead to impact and move forward equity-focused systemic changes.
- Building collaborative **local leadership** is viewed as being critical for the **sustainability** of place-based efforts.
- Funders have increasingly worked to address connections between **race, place and community history.** Funders should step outside the comfort zone of neutrality and **be explicit about their equity goals**.
- Both community engagement and investment practices must be **flexible** and **adapt** according to the needs of a community when taking a place-based funding approach.

Methodology

This literature review pulled from a range of work on place-based funding but focused on understanding the experiences of funders and key considerations for funders who choose to engage in place-based investments, particularly those centered on social impact. Our team reviewed a total of 49 resources for inclusion in this literature review. In addition to peer-reviewed publications, this review incorporated a range of field-facing reports, reviews and blog posts from thought leaders with an emphasis on the understanding of and work related to place, DEI and their intersections. The documents focused heavily on understanding funders' experiences, lessons learned and key takeaways from engaging in place-based efforts.

Typical Characteristics of Place-Based Investing

Place-based approaches are unique in the way they seek to take a multifaceted lens and focus deeply on building change both within and across a specific community.[4] Place-based investment approaches typically consider a more holistic, systemic understanding of how social problems and the changes needed to help address them will require a variety of supports to create impact.[5] By taking a systems-level view and acknowledging the interrelatedness of supports needed as well as the interaction and nesting of issues at a local and larger regional or state level, place-based funding often seeks to produce shifts within the systems structures and norms that impact change.[6]

While distinct siloes of efforts often exist in other philanthropic and public policy work, in a place-based approach, emphasis is placed on blending both economic development and human service strategies.[7] Furthermore, rather than focusing all attention and resources on a few distinct grantees, many foundations choose to adopt place-based approaches that spread support across multiple organizations within a community that engage in complementary and mutually reinforcing work to help foster collaboration toward a common goal.[8] Place-based approaches often focus on unique community contexts within a geographically bounded area and seek to improve ecosystems through a variety of partnership models, with a focus on achieving ambitious long-term goals.[9]

Funders often choose to take a place-based approach because they want to concentrate their resources and increase the impact of their funding within a specific location where they have a connection.[10] Funders typically choose places where they have a relational or strategic connection and develop their strategy around the context and needs of that specific place. The goal of place-based funding is not just to operate within a place but to improve specific outcomes for people living within that place.[11]

Place-based investments are:
Focused on **geographically bounded** areas and **reflect community contexts.**
Intended **to build or improve localized ecosystems** through a variety of **partnerships** and social-change models.
Used **in concert with other investment strategies**, community resources and assets.
Shaped primarily by **long-term goals** that may be achieved beyond the timeline of financial support.
Place-based investments are *not*:
Focused on **replicating programs or models with fidelity** across communities.
Intended **to implement and sustain programs** and program models.
Used as **stand-alone investments** reliant on a **single funding source.**
Shaped by **short-term outcomes** that are **rapidly achievable.**

Source: Equal Measure (2020)

Funders who choose to take a place-based approach are typically deeply interested in and committed to engaging stakeholders in the work, and they seek to build up the capacity and sustainability of efforts within a community.[12] Place-based efforts seek to address significant, deep-rooted issues such as poverty, community health or education disparities and view a holistic approach and support as key to helping create and sustain impact.[13]

By confining the focus to a specific, bounded location, funders often feel they are better able to achieve measurable changes that advance their goals.[14] While challenges remain, a number of place-based initiative efforts have led to measurable improvements.[15] Efforts like The California Endowment's Building Healthy

Communities initiative have been able to create systemic changes through legislative action and have seen quantifiable changes in outcome data, such as in their work around discipline practices for boys of color in California schools.[16] In addition, collective impact efforts that are deeply rooted in place have also been found to contribute meaningfully to desired population and systems-level changes.[17] While additional research can help strengthen the field's understanding of how place-based efforts can best achieve and measure the impact of their work, support for the promise of this approach seems clear.

Defining Place

A range of factors can inform an understanding of place, including geographic, political, cultural and contextual boundaries. A number of different aspects of a location can be considered in order to understand and define the outlines of "place" in a funding approach. Beyond just the preidentified geographic boundaries based on state, city or neighborhood, a range of other considerations should inform the understanding of a place. Researchers who focus on place and place identity have created a framework to consider the factors that influence an understanding of place, including both external focused factors (such as institutional and physical features) and internal factors (such as individual and collective experiences and perceptions).[18]

In terms of external factors, institutional features such as political and geographic boundaries—the borders that determine what governing bodies (legislative, regulatory and/or institutional) operate within a space—can determine the lived reality of residents within those boundaries.[19] The physical space, such as the building, landscapes and uses of the land within a location, can also help inform a definition of a place.[20]

In addition, more internal factors such as cultural, contextual and relational boundaries can be considered as dimensions of place.[21] Some researchers posit that place refers to a broader sociological interpretation of a location that highlights social networks, the cultural identities of individuals and collective actors who engage within a community.[22] Individuals may define place based on their own shared sense of culture, experiences or other understanding of spaces.[23] Place is composed of not only the natural or built environment within a location but also the social relationships, economic resources and individual and collective meanings that individuals may attribute to a place.[24]

In practice, many funders have defined place primarily in terms of distinct pre-mapped geographic boundaries, typically at the neighborhood, city or regional levels.[25] A pre-mapped geographic definition of place is useful in that a community within a defined location can be identified both as a target for change and as an administrative launching pad, a clear location on which to base efforts and bound expectations for impact.[26] When it comes to philanthropic and social-change efforts, place is often defined primarily on predetermined boundaries at a functional level. Defining "place" in terms of a specific predetermined and mapped geography—whether that be a neighborhood, city, region or other boundary—is an intuitive definition and one of the most common approaches.[27] When people think of place-based efforts, their mental image is often that of a multiyear initiative focused on a distinctly bound, economically distressed neighborhood.[28] This common understanding is typically informed by and rooted in decades-old examples of place-based funding models tracing back to initiatives such as the Ford Foundation's Gray Areas Project and the U.S. government's 1964 Community Action Program.[29]

While geographic boundaries provide a convenient defined space to operate within, funders have also more broadly acknowledged that place is not only rooted in physical spaces but also in networks of relationships.[30]

The assumption behind defining place primarily through geographic boundaries is that place is composed of both the physical space of a geography and by the social, cultural, civic, political, racial and organizational attributes of the individuals living within that space, and those attributes will be common in some way across individuals living within a specific geographic location.[31] While communities will not be monolithic, and different individuals and groups within a community may have vastly different and even conflicting understandings and experiences, community members at a foundational level share the geographic location in which they are located.[32] Though the literature reviewed here spoke in detail about practices of place-based investing, additional research exploring definitions of dimensions and place from a funder perspective could be useful to the field.

Key Principles of Place-Based Investing

Key principles in place-based grantmaking include community engagement, mutual learning, shared ownership, systems-levEl understanding, transparent and consistent communication, race, inclusion, diversity and equity and a long-term commitment. As funders approach place-based investing, these principles will make it more likely that place-based investments lead to impact and move forward equity-focused systemic changes.

COMMUNITY ENGAGEMENT includes prioritizing relationship and trust building. Community engagement is a core component of place-based grantmaking. Engaging community members, grantees and other stakeholders in identifying and prioritizing the changes needed within a place, as well as potentially designing and implementing strategies to achieve impact, are cornerstones of place-based work.[33] Community engagement can serve multiple functions: it helps funders better understand the history and context of a community, build and strengthen relationships and identify shared interests across stakeholder groups. It also helps promote initiatives and elevate public understanding of the work.[34]

Without a deep understanding of local history and dynamics, funders may not fully appreciate the experiences and history of a community and the way a community's history influences how solutions or strategies are received. Longstanding rifts and personality clashes have the potential to undermine place-based efforts.[35] Beyond just the grantees that a funder may intend to work with, it is important to recognize that community members have a unique vantage point that funders can benefit learning from to deeply understand history, context and dynamics within the place they seek to work. As funders consider their community engagement, they should not only listen to the perspective of community members but also actively

> **Key Principles for Place-Based Grantmaking**
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> ✳ **COMMUNITY ENGAGEMENT:** Prioritize authentic community engagement and trust building.
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> ✳ **MUTUAL LEARNING:** Use data to engage in mutual learning.
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> ✳ **SHARED OWNERSHIP:** Prioritize collaborative, co-owned design of efforts.
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> ✳ **SYSTEMS-LEVEL UNDERSTANDING:** Link local efforts with larger systems-level changes.
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> ✳ **TRANSPARENT AND CONSISTENT COMMUNICATION**: Prioritize transparency and consistent communication.
>
> ✳ **RACE, INCLUSION, DIVERSITY AND EQUITY:** Actively name and address issues of race, inclusion, diversity and equity.
>
> ✳ **LONG-TERM:** Recognize that this work requires long-term investment and commit to the long haul.

take it into consideration as they make decisions. By building strong relationships within the community, funders, grantees and other partners are more likely to follow through on their agreements.[36] Community engagement is a crucial piece of facilitating a consensus on a shared vision for the community and in securing buy-in of partners aligned around common outcomes and goals.[37]

People in communities who are closest to and experience the impacts of oppressive systems have unique insights into both the challenges and potential solutions.[38] Engaging them as co-designers in the work can help build equity-centered solutions.[39] Research suggests that leaders who are proximate—those who have a shared lived experience, shared identity and/or shared place with the communities they seek to serve—are often best positioned to lead solutions for their own communities.[40] As funders seek to engage with communities and work deeply in place, learning from those who are most proximate to the problem and understanding the existing solutions and efforts that exist can be powerful.[41]

Funders should also be clear about how community engagement processes are informing their own thinking, strategy and efforts. Closing the feedback loop and sharing back how community engagement is being incorporated and informing the approach of funders and their partners within a place-based effort is one way to do this. Place-based efforts are likely to struggle to succeed if community members do not feel they are active participants in developing the work and can clearly understand how their feedback is being incorporated.[42]

Strategically, this means that community engagement should be embedded as a core priority within funders' strategy documents for place-based efforts. A strong theory of change and/or logic model that is directly informed by community input can help ensure that goals are clear, transparent and aligned to realistic outcomes for a community.[43] Over the past decade, funders have increasingly used these theories of change and logic models as tools to ensure their goals, strategies and timelines are realistically aligned with intended outcomes and have the greatest chance to be sustained.[44] A community-informed theory of change or logic model can also help ensure there is a clear understanding of and capacity to collect data most aligned with progress indicators as well as engage stakeholders in thinking about issues of scale and sustainability.[45] Sustainability in particular is helpful to consider as a strategy is being developed, especially in terms of how the work can be best institutionalized and efforts can be continued even after philanthropic funding ends.[46]

Community engagement should be an ongoing process that is adaptive to incorporate the perspectives and experiences of a diverse range of stakeholders. Funders should build into their strategies the ability to adapt their approaches and prioritize elevating a diverse range of stakeholders. Many place-based initiatives find that it is important to create structures to ensure that community stakeholders' voices and perceptions are not overshadowed by grantees or larger organizations.[47] In order for the voices of a diverse range of stakeholders to be included in the process, they should be engaged and represented, not just as tokens but in sufficient numbers, and supported with equal confidence, information and power.[48] Engagement strategies should be tailored and sequenced to serve the priority stakeholder groups most affected by and needed for the change effort to be successful; as funders continue to engage in place-based work, they should use direct feedback from stakeholders to iterate and improve community engagement processes to best meet the needs and forums for engagement that work well for the community.[49]

Operationally, place-based efforts require consistent, coherent community engagement efforts from staff members who deeply understand community context. Leaders of place-based efforts have stated that trust is earned in part by consistently showing up in community forums, actively listening to stakeholders and accepting critical feedback.[50] Some national foundations, such as the W.K. Kellogg Foundation and the John S. and James L.

Knight Foundation, have engaged in place-based approaches and created satellite offices staffed by those with ties to the local community.[51] By staffing their field offices and prioritizing community engagement with individuals who bring an understanding of the social and historical context of the community, funders are better able to engage with stakeholders in more formal and informal settings. This higher-touch approach can feel more committed and authentic.[52]

Additionally, funders should prioritize community engagement efforts that help build up local, collaborative leadership. Researchers name strong leadership as being central to resource activation, and the core elements of strong leadership (generating trust, providing meaning to stakeholders, working with partners and communicating values) are key components of what will be needed to continue efforts in a sustainable way.[53] Some funders argue that the power and momentum needed to pull the levers for sustainable change are ultimately created by the combination of locally empowered leaders connecting with leaders at the state and regional levels.[54] Locally based and respected leaders are key for drawing on both federal and local funding sources and creating a coalition of investors who care about the outcomes of the work, which can help with financial sustainability of efforts.[55] Additionally, some reports show a promising trend in the field of increased braiding of resources across public, philanthropic and corporate sectors in order to support place-based efforts, allowing for increasingly well-resourced and ambitious initiatives that are more likely to be sustained and potentially scaled over time.[56]

Funders should be sure to thoughtfully utilize data to engage in **MUTUAL LEARNING.**

Valid, reliable data and actionable analyses are crucial to the success of place-based efforts.[57] Strong place-based efforts prioritize understanding how to manage, analyze and use data coming from both researchers and communities directly and how to use that data to translate planning for strategic directions.[58] The combination of both quantitative outcome measures and qualitative data is useful for understanding not only what change is happening but also why.[59] Strong use of data helps inform planning and aids decisionmakers as they consider how to target resources effectively.[60]

Data and analyses can also serve as the foundation for engaging in mutual, cross-partner learning. While learning and documentation have commonly been understood by funders to be more "process" activities that compete with the actual implementation workstreams of an initiative, more recent place-based efforts and research have helped reframe learning and documentation as being key to making implementation more informed and sustainable over time.[61] Furthermore, some researchers argue that the long-term success of interconnected community-change efforts is in fact dependent upon broad problem-solving capacities across a range of stakeholders. Engaging in mutual learning, based on clear and transparent data from the community, allows for a wider array of knowledge and expertise and ensures that historical context and learning are not siloed within one actor, ultimately helping build that broader set of problem-solving capacities across stakeholders.[62] Co-designed assessments and participatory evaluation processes, while often challenging to implement in practice, can help support this learning in a way that is informed by the community.[63]

Strategically, this means that leaders of place-based initiatives must embrace the need to take a flexible evaluation approach. One of the strengths of a place-based approach is that efforts are adapted to community context, allowing a variety of strategies and activities to be deployed. Given the potential wide variation of contexts in each community—history, capacity, political dynamics, leadership and other factors—both strategies and evaluations must consider the different resources that communities are bringing to the work and tailor approaches to fit those contexts.[64] However, this can make evaluation design more complex. Evaluators need to be flexible and make compromises on what they are able to evaluate.[65] An evaluation-planning process can

provide an opportunity for sense-making across funders and stakeholders and elevate assumptions each bring to the table.[66] Early evaluation findings may highlight the need for the funder to revisit the exercise of defining their evaluation approach, perhaps with a broader group of stakeholders, and ensure that the evaluation aligns with both strategic intent and organizational practices as the work continues to move forward.[67]

Operationally, building and supporting strong systems to collect data that allow stakeholders to understand and evaluate the impact of the work are crucial. Data are important tools to inspire stakeholders across sectors to come together and support advancing their key priorities within communities, uniting actors around a common understanding and cause.[68] The organization or organizations collecting and synthesizing data can vary, from a stand-alone intermediary to a city government agency to a higher education institution.[69] But it must be clearly established from the outset of an effort what data will be gathered, by whom, how that data will be shared out more broadly and what data are being used for evaluation efforts.

SHARED OWNERSHIP of the work places an emphasis on collaborative, co-owned design of efforts.

A common theme across place-based efforts is the importance of prioritizing collaboration and shared ownership across stakeholders. Leaders of place-based initiatives recognize that the challenges facing communities cannot be addressed working alone or in silos. Rather, they require cross-sector, cross-partnership solutions and collaboration.[70] Given the complex and multipartner structure of place-based efforts, it is particularly important to establish clear roles and responsibilities from the onset of an effort and revisit them regularly to adjust as needed.[71] Bringing partners to the table and collaboratively defining roles and focus areas can be a beneficial practice. Clarifying roles can help avoid misalignment of expectations and misunderstandings between partners.[72]

This principle brings together and underscores the importance of both community engagement and thoughtful use of data for adaptive learning. Collaborative learning can take place in a variety of structures, ranging from peer networking to team problem-solving to communities of practice. Collaborative efforts are often more powerful than the actions of individual organizations, and the time spent building and maintaining diverse partnerships and alliances can help speed up change and the adoption and implementation of new policies.[73] As part of this collaboration and shared ownership, it is important that funders in particular recognize, name and seek to address power dynamics. Given the power dynamics surrounding financial support, many grantees often feel reticent to provide candid, consistent feedback. The traditional funder/grantee relationship dynamic is often deeply ingrained and requires significant work to overcome.[74] As funders seek to respect an understanding of place and the importance of community leadership, they must strive to acknowledge their own power and grow the power of others rather than simply wielding their own.[75]

Strategically, place-based efforts should be intentional about ensuring that partners share power and ownership of the work and engage collaboratively, not just in implementing efforts but also in setting a strategic vision. The literature leans heavily on the importance of building up community ownership and leadership of efforts in order for change to be sustainable and deeply impact the lived experience of community members. The participation of stakeholders can exist on a spectrum, ranging from simply informing to truly empowering.[76] Given their own internal structures and cultures, funders must be internally reflective and honest with both themselves and their partners about the extent to which they are willing to truly co-own and co-create strategies with grantees versus simply involve grantees and listen to their feedback.[77] Funders should clearly

communicate with the community partners they are working with about how they will be engaged and to what extent their feedback will be incorporated into decisionmaking.

Operationally, many funders have recognized that it is crucial to include grassroots leaders, particularly BIPOC leaders, at the very beginning of efforts to help define funding priorities, set strategy and support making funding decisions.[78] Ensuring that stakeholders are co-leaders in work can help build greater collective ownership of the work and ensure that funders deeply understand community context.[79] Depending on the strategy and comfort level with co-creation of the funder, stakeholders can engage in a range of activities, from jointly creating grant proposals with funders to engaging in robust feedback conversations with funders that inform how funders draft grant proposals and budget recommendations.[80] Stakeholders can also share the work after a grant has launched, for example, by contributing to the development of programs through convenings, trainings and affinity groups.[81]

Engaging with a broader **SYSTEMS-LEVEL UNDERSTANDING** of the work includes linking local efforts with systems-level changes.

Multiple researchers note that one of the clearest distinctions of more modern place-based efforts is the understanding that change cannot be affected solely by working in one neighborhood at a time. The problems that communities face are not isolated issues unique to that place but rather the result of broader systemic and socioeconomic issues.[82] Place-based practitioners recognize that systems change needs to occur at multiple levels and that change happens most effectively when both those at the "grassroots" and at the "grass tops" levels are engaged.[83]

One helpful mental model for understanding and articulating the connections between local and systems-level work is the idea of a collection of nested efforts.[84] These efforts build upon each other and are mutually reinforcing at different levels, with neighborhood or community-level efforts fitting together within a larger system of reforms and policy actions.[85] Funders must focus not only on ground-level implementation and programmatic support but also on influencing larger systemic and policy factors in order to have the desired impact.

Strategically, strong place-based efforts consider how to build an understanding of and strategy for a dual approach that examines and attempts to influence both local and broader systems-level change.[86] Funders can consider what other levers beyond grantmaking can be pulled within their resource and skill set to advance the outcomes they seek to influence.[87] This could include, but is not limited to, convening, advocacy, capacity-building supports or community organizing.[88]

Operationally, funders should prioritize both active program implementation and support at the level of place (i.e., the identified neighborhood, city, region, etc.) as well as dedicate resources to understanding the broader policies that influence the current state of systems within a community. Any policies that address the underlying structures or root causes of the issues the funder is seeking to address are relevant in this work.[89] Funders can consider how a mix of support beyond simply grantmaking can best be deployed to support place-based efforts including, but not limited to, convening, engaging in advocacy and leveraging the foundation's own political and social capital to influence relevant stakeholders.[90]

Prioritize TRANSPARENT AND CONSISTENT COMMUNICATION practices.

Partners involved in supporting and implementing place-based efforts—particularly funders—need to be accountable and transparent with their partners and the communities they seek to work in.[91] Within a place-based effort, this can include strong facilitation of information flow between partners, written agreements that articulate the expectations of partnership members and time spent at the start of an effort to articulate roles, accountability and rules of engagement across all partners.[92] Given the power dynamics that exist between funders and their grantees, funders in particular must be clear from the onset of work about what their assumptions, interests and expectations are, and they must be willing to negotiate with clarity on the details of funding, benchmarks and measures of success.[93]

Evaluators of place-based efforts recommend a communications strategy that is focused on the broader community as well as one that regularly communicates the broader collective vision, mission and goals of the effort.[94] A consistent and coherent communications strategy helps inform the public about the work of partners.[95] Regularly sharing the positive accomplishments that result from efforts and identifying how those accomplishments fit within and build up the larger intended arc of change can also help deepen understanding of the bigger picture and intended outcomes.[96]

Strategically, a coherent and consistent communications strategy should be included as a core component of the planning process for place-based efforts. Communications efforts should be viewed as complementary and supportive of broader place-based initiative efforts rather than a nice-to-have component of the work.

Operationally, place-based efforts should dedicate resources toward supporting communications efforts, both in tandem with broader community engagement efforts and beyond. Communications efforts are most impactful when they intentionally communicate the place-based effort's larger collective vision and strategic goals and elevate the positive accomplishments and wins, both small and large, of partners.[97] Additionally, priority should be placed on establishing partnership member roles and expectations from the onset of the work as well as ensuring ongoing and consistent communication practices among partners.[98]

Actively name and address issues of RACE, INCLUSION, DIVERSITY AND EQUITY.

Many funders who seek to work in a defined place have increasingly begun to address the important connections between place and race. Funders engaging in place-based efforts often explicitly acknowledge that poverty, race and place are linked through a variety of structural and institutional forces and that they must build relationships with and learn from stakeholders in order to explicitly address these systemic forces.[99] Funders who are doing the deepest work in equitable place-based community change have articulated a strong commitment to equity and inclusion, including a commitment to understanding historical context and implicit bias.[100] In order to ensure that racial equity is truly considered, funders and other partners in place-based efforts make racial equity a goal and articulate what actions they will take to embed it in their own practices.[101] A study of 25 collective impact initiatives found that initiatives with a stronger equity focus were associated with some achievement of equitable systems and population changes.[102]

Funders can and should step outside the comfort zone of neutrality and be explicit about their equity goals.[103] Practitioners and researchers alike have stated that funders are well positioned to take a lead on conversations and goal setting around racial equity efforts within place-based initiatives. All place-based partners should reflect on how their own policies and practices could better address and support racial equity.[104] Funders should intentionally and respectfully engage on issues of race, class and culture within their community engagement

strategies and, more broadly, seek to embed racial equity in concrete practices of their work.[105] This can include hiring staff members and working with organizations led by those who represent the communities they seek to serve, developing shared language, setting and following through on explicit racial equity goals, addressing resistance and embracing honest dialogue and open conflict.[106]

Strategically, as place-based efforts construct their overarching mission, vision, goals and strategy for the work, making racial equity an explicit priority will help ensure that it continues to stay a focus of efforts throughout the lifetime of the work.[111] Funders and other key partners can engage in intentional reflection and sense-making around their internal equity and inclusion values and interrogate their own policies and practices to identify opportunities to better align their lived efforts with their stated values.[112]

Operationally, funders of place-based efforts can help advance racial equity and deepen their understanding of issues related to race, inclusion, diversity and equity by intentionally building connections with peer communities and initiatives doing similar work in other locations.[113] Furthermore, considerations of race, inclusion, diversity and equity can be baked into core pieces of strategy implementation, including the construction of partner recruitment and application processes, community engagement practices and approaches, communication-strategy implementation and professional development opportunities for partner members centered on race, inclusion, diversity and equity.[114] Funders can also consider centering partners around a diversity, equity and inclusion framework that includes specific commitments for engaging equitably such as disaggregating data, focusing on understanding root causes and examining the impact of key decisions and policies on equity and inclusion.[115]

> **Examples of Funder Race, Inclusion and Diversity Related Efforts**
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> - The Building Healthy Communities (BHC) initiative, a 10-year endeavor in California, listened to and incorporated perspectives of young people on the harms of discretionary school suspensions across their 14 sites, specifically naming the racialization of disproportionate suspension practices in schools. This led to legislative action and ultimately helped reduce suspensions of Black, Native American and Latino boys.[107]
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> - The Strong, Prosperous, And Resilient Communities Challenge (SPARCC), a multiyear effort at six sites across the country, integrated explicit racial equity goals into their work, which prompted changes in mindsets of stakeholders and resulted in a shift in leadership at one site from a white-led implementing organization to a Black-led one.[108]
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> - The Chicago Community Trust, in recognition of their equity priorities, ensured that Black and Latinx communities are represented on the coalition steering committee, with one-third of the committee being comprised of community members.[109]
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> - The Building Community Philanthropy (BCP) initiative operationalized racial equity for their evaluation framework, identifying three key areas of outcomes (internal representation, collective advocacy and community-centered practices) as well as three levels of change (organizational, BCP initiative and ecosystem).[110]

Internally, a culture that supports systemically incorporating equity in the work a funder does is an important starting point.[116] This can include explicit commitments to equity and inclusion, hiring staff who have lived experience with and a deep understanding of the communities they seek to support, engaging in learning around privilege and bias and developing a strong learning culture that serves as a space for incorporating more inclusive practices.[117]

Recognize that this work requires LONG-TERM investment and commit to the long haul.

Given the need for authentic community engagement, trust, collaboration and nested systems change, it is understandable that place-based efforts require a long-term commitment. Researchers and practitioners vary in their named estimates of reasonable timelines. Some state that a five-to-ten-year time frame for a place-based investment strategy is typical, while others feel that ten years is an optimistic horizon given the complex work needed for these efforts.[118] However, there is consensus that this work cannot be done effectively within a short time period and that a longer-term consideration is necessary for engaging in place-based efforts.

The problems that place-based efforts seek to address are often multigenerational and will take more than a short-term investment to fully understand, let alone begin to truly tackle.[119] Addressing longstanding issues such as poverty, education systems, housing systems or achievement gaps will not happen overnight or on short investment cycles. Continued commitment to efforts is crucial for changing systems that can lead to long-term impact.[120] Furthermore, trust between a funder and community partners is not formed overnight. Allowing time to build relationships, understand context, innovate and learn from successes and failures and enact changes across nested systems and policies is crucial to ensuring that efforts are successful.[121]

The impacts that place-based efforts seek to enact, both at the local and systems levels, require time to take root. Committing to a place over a longer period gives funders time to build trust, develop relationships and deeply understand the context of a place. Longer periods of commitment also give funders time to seek cooperation and resources from other funders, whether that be private or public.[122]

Strategically, as funders construct their theory of change and logic models, they must incorporate and commit to an understanding that the changes they seek to influence require a longer time frame than may be historically typical for their engagements. Longer time horizons create opportunities for a more sustained path to long-term systems change, and strategy development should reflect that priority for sticking in place over extended time periods.[123] This consideration of the long-term nature of the work should also inform the way in which funders think about measurement, learning and evaluation practices, identifying realistic timetables and outcomes along the way.[124]

Operationally, committing to long-term work may feel daunting or provide a challenge to show results. Early actions that reinforce initial engagement and partnership development and generate immediate, tangible small wins can help build trust, strengthen partnerships and highlight the value of the place-based effort.[125] However, it is important to note that these early, smaller-scale wins must be part of a larger plan for using the results of these actions to build shared knowledge and capacity to enact next steps that inform longer-term efforts.[126]

Areas for Further Research

Based on the literature in the field, the reasoning for engaging in place-based investing feels clear: This approach can serve as an important pathway to more equitable and sustainable impact that addresses the nuance of local contexts as well as the systemic change needed to influence outcomes. For funders who seek to address persistent, large-scale challenges, a place-based approach can be a powerful tool. However, while many lessons have been learned in the preceding decades, additional research is needed to help deepen the field's understanding. Key areas that would be helpful for future research to focus on include funders' understanding of and definitions of the dimensions of place, best practices in measurement, learning and evaluation design approaches and the relationship between trust and sustainability of place-based efforts.

Conclusion

This work is not easy—it is complex, cross sector, long-term and requires learning from all partners.[127] At each step of the way, funders must ask themselves if the work they are doing helps promote or undermine local ownership.[128] All partners must engage with vulnerability, empathy and honesty in order to create responsive relationships between funders and community that are rooted in the needs of a place. Funders in particular must stay well attuned and build an understanding of the historical context of a community, the ongoing dynamics and the interests that motivate other actors within a place.[129] By rooting their efforts in the key principles of community engagement, mutual learning, shared ownership, systems-level understanding, transparent and consistent communication, race, inclusion, diversity and equity and long-term commitment, funders can work with communities in a way that allows their efforts to create significant, sustainable impact.

Appendix

Key Terms

List of working definitions for key terms in this review:

Backbones: Structures comprised of a single or multiple organizations that fulfill several core functions and facilitate action and accountability across place-based partnerships. Also referred to as intermediaries.

Community: The site and the site's population that a place-based partnership seeks to serve.

Developmental evaluation: Used to understand the results and implications of current strategies and related significant events to inform real-time adjustments.[130]

Formative evaluation: Used to understand the "through line" of work and document how significant events and context affect change.[131]

Grassroots grantmaking: A place-based grantmaking approach that focuses on strengthening and connecting resident-led organizations and their leaders in urban neighborhoods and rural communities.[132]

Place-based partnerships: Networks of people and organizations in the same geographic area who work together to change systems, improve community outcomes and achieve shared goals.[133]

Systems change: A shift in the conditions that produce and maintain societal problems such as practices, structures, policies, power dynamics, resource flows and mindsets; it often brings together stakeholders from multiple sectors including nonprofit, public, private or philanthropic institutions along with community constituents.[134]

Summative evaluation: Used to link the initiative's activities to the targeted policy, practice and community changes outcomes.[135]

End Notes

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