

# The Foundation Review

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Volume 13

Issue 4 *Community Leadership and the Sustainable Development Goals (SDG)*

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## Full Issue

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THE

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Community Leadership and the Sustainable Development Goals (SDGs)



Results

The Case of Fondazione Compagnia di San Paolo ..... 7

The SDGs and Collective Impact ..... 18

Sector

Walking the Talk ..... 32

Tools

A Tool for Thinking About the SDGs ..... 47

Localizing the 2030 Agenda ..... 59

Reflective Practice

The Transformative Power of the SDGs..... 74

Executive Summaries..... 89

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# THE FoundationReview®

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**Cover Graphic:** Icons of the United Nations' 17 Sustainable Development Goals. Learn more at <https://sdgs.un.org/goals>.



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# In this issue:

## Results

---

### Doing Philanthropy at the Time of the Sustainable Development Goals: The Case of Fondazione Compagnia di San Paolo

7

Fulvio Bersanetti, M.A., Filippo Candela, Ph.D., and Paolo Mulassano, Ph.D., Fondazione Compagnia di San Paolo

### A Case Study on the Use of the SDGs With a Collective Impact Initiative in Southwest Florida

18

Tessa LeSage, M.P.A., FutureMakers Coalition/Collaboratory; Aysegul Timur, Ph.D., Florida Gulf Coast University; and Dakota Pawlicki, M.P.A., CivicLab

## Sector

---

### Walking the Talk on Sustainable Development Goals: The Case of Community Foundations in Canada

32

Marta Rey-Garcia, Ph.D., University of A Coruña and the Canadian Philanthropy Partnership Research Network; and Rosane Dal Magro, M.B.A., Canadian Philanthropy Partnership Research Network

## Tools

---

### Where to Start? A Tool for Thinking About the SDGs and Community Foundation Work

47

Katie Leone, M.A., and Tessa LeSage, M.P.A., Collaboratory

### Localizing the 2030 Agenda With Community Data: Lessons From the Community Foundations of Canada's Vital Signs Program

59

Beth Timmers, Ph.D., International Institute for Sustainable Development; and Alison Sidney, B.A., Community Foundations of Canada

## Reflective Practice

---

### The Transformative Power of the 2030 U.N. Sustainable Development Goals

74

Anna Wasescha, Ph.D., West Central Initiative; Christa Otteson, M.A., Vela Strategy; and Sarah Casey, West Central Initiative

## Plus

---

### Executive Summaries

89

# Editorial

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Dear readers,

In this issue we focus on the United Nations' Sustainable Development Goals (SDGs) and how they can be used as tools for community leadership. The SDGs, based on five pillars for sustainable development (economic, social, environmental, cultural, security), acknowledge that sustainable development needs to happen everywhere and that inequality exists within all communities. As such, the SDGs are meant to be implemented in all nations, with a focus on community-level actions and indicators that are meant to ensure that no one is left behind.

**Bersanetti, Candela, and Mulassano** provide a case study of how Fondazione Compagnia di San Paolo applied the Sustainable Development Goals to fundamentally restructure its operation. The foundation, whose roots go back centuries, reorganized its operations around the SDGs in 2020 as they also began functioning as an operating foundation. Framing their work around the SDGs has allowed the foundation to better align its work internally, with grantees, and with other community efforts.

One of the more widely known approaches to community change over the past decade has been collective impact. **LeSage, Timur, and Pawlicki** describe how the SDGs provided a useful framework on which to design, evaluate, and communicate a collective impact initiative. They provide a case study of the FutureMakers Coalition, a collective impact initiative launched by the Southwest Florida Community. They used the SDGs to help build consensus among 251 active partners on how to measure progress toward the coalition's shared goal.

Many Canadian community foundations have adopted the SDGs. **Rey-Garcia and Dal Magro** provide a global and national context to adoption of the Sustainable Development Goals by Canadian community foundations through a multiple case study. Social innovation at the grassroots level was diffused by the Community Foundations of Canada to its member foundations to promote adoption. Prior collaborative relationships, including data collection, and the space for local adaptation were key to successful adoption. Community foundations have found adopting the SDGs supports new partnerships and coherent strategy development.

**Leone and LeSage** explore the use of a point-of-entry wheel to create a shared language that can help community foundations align their local efforts with the global goals. Collaboratory developed the wheel to provide a visualization of how the SDG framework support integration of sustainability across the foundation. They found that the process of SDG alignment made its local philanthropic work more coherent, relevant, and adaptable over time. The foundation also identified areas where further peer-learning between practitioners in the field is needed to refine approaches and processes and to build philanthropic capacity around the global goals.

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**Timmers and Sidney** analyze the critical role that community indicators can play in helping community foundations to address the complex societal and environmental challenges embodied in the SDGs. Measurement is an integral component of Agenda 2030 and the SDGs, and communities are increasingly using indicators to align their plans, inform grant-making decisions, and track equity and sustainability outcomes. This article highlights case studies from three community foundations in Canada that have aligned other community indicators and associated programming with the SDGs to coordinate community action.

The West Central Initiative, a mostly rural community foundation and regional development organization in Minnesota, integrated the United Nations 17 Sustainable Development Goals into its strategic plan in 2019. **Wasescha, Otteson, and Casey** describe the strategic planning process that led to adoption of the goals, articulate how they have helped evolve the interplay of economic development and philanthropy, and identify lessons learned from the first two years of working with the goals. They argue that the SDGs provide a vision for what sustainable, inclusive communities should look like.

Perhaps because of their origin with the United Nations, the Sustainable Development Goals may be seen by U.S. based foundations as applying to developing countries, not to them and the communities they serve. The articles in this issue demonstrate that the SDGs are a robust blueprint for any philanthropist concerned about the many global challenges we all face.

Finally, in this last issue of Volume 13, I want to extend deep appreciation to those who served as reviewers for the past year. The journal would not be possible without these professionals who take the time to provide thoughtful feedback to authors in the spirit of improving their work. A list of reviewers for the issue is on p. 92. I also want to extend a special note of appreciation to Domenica Trevor, who does a masterful job copyediting every article.



A handwritten signature in dark ink, appearing to read 'Teresa Behrens'.

Teresa R. Behrens, Ph.D.  
Editor in Chief, *The Foundation Review*  
Executive Director, Dorothy A. Johnson Center  
for Philanthropy at Grand Valley State University





# Doing Philanthropy at the Time of the Sustainable Development Goals: The Case of Fondazione Compagnia di San Paolo

Fulvio Bersanetti, M.A., Filippo Candela, Ph.D., and Paolo Mulassano, Ph.D., Fondazione Compagnia di San Paolo

**Keywords:** *Innovative philanthropy, impact, ecosystem developer, SDG, sustainability, data-driven foundation, Agenda 2030, Compagnia di San Paolo*

## Adopting Sustainability in the Philanthropic Sector

Compagnia di San Paolo, founded in Turin in 1563 to promote cultural, social, and economic development in northwestern Italy, was the first Italian foundation of banking origin to promote a strategic and operational alignment with the United Nations 2030 Agenda and the Sustainable Development Goals (SDGs), in 2020. Although the Agenda is primarily addressed to governments and policymakers, this people-centered set of transformative goals and targets calls for collective mobilization among all stakeholders to implement a universal plan for people, the planet, and prosperity. The more society, individuals, and communities are aware of the issues surrounding local sustainable development, the more successful the process of convergence toward the goals will be.

Public involvement in the SDG framework has increased in recent years, and a growing number of governments, private institutions and organizations, corporations, and nonprofits have begun a process of alignment. In addition to fostering collaboration among stakeholders, philanthropy can help these efforts through advocacy, facilitating implementation, and engaging in outreach activities that address the core human development, economic, and environmental needs expressed in the SDGs (Rockefeller Philanthropy Advisors, 2019). According to the Organisation for Economic Co-operation and Development (OECD), private philanthropic funding for these efforts amounted to USD \$7.8 billion in 2018 (OECD, 2020) and has played a

## Key Points

- This article outlines how strategic philanthropy can align its mission with the United Nations 2030 Agenda for Sustainable Development by describing the experience of the most important foundation of banking origin in Italy. Fondazione Compagnia di San Paolo marked a milestone in 2020 in aligning with the Agenda, applying the Sustainable Development Goals as a rigorous, internationally shared methodological framework and restructuring its operations to focus on three programmatic efforts — Planet, People, and Culture — aligned with those goals.
- To complete our examination of this transformation, we conducted a benchmark analysis involving nine case studies of foundations in Europe and the United States to identify the level of engagement and convergence of each with the 2030 Agenda framework.
- This article begins with an introduction to the topic of sustainability in the philanthropic sector, which is followed by a case study of the Compagnia di San Paolo's path to adoption of the framework. It then measures the impact of its activities through quantitative indicators, highlighting the foundation's transformation, and concludes with a comparison between Compagnia di San Paolo's approaches and some international best practices to provide a better understanding of our long-term positioning in the international context.

*[T]he COVID-19 pandemic has brought to the fore problems that existed before the crisis and required us to learn lessons and act proactively to promote more sustainable activities, such as aligning grants and investments with social programs and climate policy[.]*

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key role in financing the social sector, including health care and education.

Engaging in philanthropy to pursue the SDGs creates the right conditions to harness new, innovative solutions. With this approach, philanthropy is seen not only as a source of money, but also as a means to enable ecosystem development. This involves investing in solutions that support innovation and collaboration, including advocating the growth of a culture of sustainability, using technology to link donors and recipients, implementing capacity-building programs to help make better use of existing resources, and using data to build transparency and to drive and inform decisions. One of the basic functions of grantmaking foundations should be to experiment with new models of intervention (and test their effectiveness) to address the most relevant issues, empowering society's best forces — universities, research institutions, nongovernmental organizations, and other associations — to operate. If this is the goal, a failure can be as useful as a success: A demonstration of ineffectiveness is a way to avoid repeating models and techniques that fail to achieve intended goals.

From this perspective, the 2030 Agenda offers a global and universal theory of change (TOC), because it is no longer conceivable to propose social intervention strategies that do not contribute to the deployment of a model of socially,

economically, environmentally, and institutionally sustainable development in which no one is left behind. Launched in the 1990s by the Aspen Institute (Connell et al., 1995), the TOC is now being adopted by major grantmaking organizations as a guide and evaluation tool. It focuses on a performance management approach that can be used for multiple purposes: to evaluate alternative programs; plan and implement initiatives; understand the ecosystem in which you operate and how it will affect your ability to achieve impact; and communicate internally and externally about your strategy and at multiple levels.

For modern philanthropy, this TOC can be seen as an impact model that can help donors allocate financial resources in a rational and strategic way to implement effective projects in line with their mission and vision. A foundationwide TOC frames the types of investments and priorities an organization has selected through the lens of impact. This means that philanthropic bodies mainly invest not only in programs with clearly defined outputs in their role of “impact facilitator,” but also in terms of outcomes in their role of “impact generator.” In other words, to assess a program's success, once a grant or an investment has been made, foundations need to verify concrete performance and results in terms of outcomes.

In this context, the COVID-19 pandemic has brought to the fore problems that existed before the crisis and required us to learn lessons and act proactively to promote more sustainable activities, such as aligning grants and investments with social programs and climate policy, which will be critical for the decarbonization agenda. Promoting resilience is key to being prepared for the exceptional events and climate risks driven by global warming. Working for digital development is also of paramount importance, as the adoption of technology is likely to accelerate in the coming decades.

### **Aligning With the 2030 Agenda**

For the Fondazione Compagnia di San Paolo, adopting this rigorous and universal framework is a way of identifying the main problems that need to be solved at the local level, using

TABLE 1 The Old Organization: Areas of Expertise

Art, Cultural Activities, and Heritage	Philanthropy and Territory	Cultural Innovation	Social Policies	Research and Health
Cultural attractors	Social innovation	Cultural enterprise	Welfare	University system
Places of culture	Circular society	Science and society	Active inclusion	International affairs
Performing arts	Community philanthropy	Cultural and civic innovation	Proximity networks	Health
Anthropized landscape	Research on the territory	Contemporary languages	Well-being and education	Scientific research and technological innovation
Early access to culture		Access and participation	Empowerment and integration	Economic and social research
			Employment policies	

TABLE 2 The New Organization: Goals and Missions

People: Art, Heritage, Participation	Culture: Opportunity, Independence, Inclusion	Planet: Knowledge, Development, Quality of Life
Building capacity to attract	Reinventing housing systems and regenerating neighborhoods	Harnessing the value of research
Developing skills	Promoting decent work	Boosting innovation
Preserving beauty	Educating for collective development	Fostering international opportunities
Encouraging active participation	Rediscovering community	Promoting well-being
	Working together for inclusion	Protecting the environment

it as a filter for selecting proposals to prioritize action in accordance with the U.N. guidelines. Through these goals and targets, we are setting out an ambitious and transformational vision based on respect for the environment, social equality, health and well-being, and scientific research and innovation.

Organization and Human Resources as Drivers of Innovation

Historically, the foundation’s operations were organized around five areas of expertise. (See

Table 1.) As of January 2020, they were restructured to pursue three goals — People, Culture, and Planet — by way of 14 missions, with each goal reflecting those original areas. (See Table 2.) Each mission has several tool kits that represent Compagnia di San Paolo’s traditional operations as a philanthropic organization (calls for proposals, agreement protocols, instrumental/ participating bodies, free grant applications, etc).

This gradual transition to the U.N. framework has also encompassed human capital

management and human resources initiatives, enhancing capacity building (i.e., several proposed Agenda 2030 Agenda for Sustainable Development training modules and webinars) and developing a more sustainable work environment by incentivizing gender equality and environmentally friendly behavior — public transportation subsidies and a plan to install electric vehicle charging stations free for employees' use at the foundation's Turin headquarters, for example.

Networking opportunities at the international, national, and local levels have also been facilitated. Compagnia's top and middle management are active on institutional advisory boards and in working groups (e.g., the Italian Alliance for Sustainable Development, which seeks to raise awareness among Italian society, economic stakeholders, and other institutions of the importance of the 2030 Agenda). Another key point is the involvement of the local community in the definition of our activities' guidelines. We have an ongoing dialogue with regional and municipal authorities, other banking foundations, and universities to better understand their needs and define what kind of interventions are most appropriate.

### Finance: How Is Modern Philanthropy Funded?

In addition to allowing Compagnia di San Paolo to perform its institutional activity as a grantmaking body, its new configuration involves other strategic aspects. Environmental, social, and governance (ESG) sustainability, for instance, becomes the core of a new, responsible investment policy that includes a careful and detailed assessment of the ESG compliance of the portfolio (mission-related investments). For Compagnia di San Paolo, implementing an investment policy that helps in achieving the SDGs has an important significance. It is based on the premise of a rigorous review of the degree of sustainability of individual portfolio investments and the management policies of funds managed by third-party managers.

Historically, finance and organized philanthropy have been seen as opposites: the former seeks profits, the latter offers its support to the nonprofit sector; one makes money (return on investment), one gives it away (by grant). Considering their substantial assets and autonomous governance, foundations can initiate interventions whose outcome cannot be taken for granted and without having to submit to the demands of shareholders or an electoral body for short-term, positive results. Freed from these constraints, foundations can take long-term risks that neither public bodies nor private companies are willing to take, thus supporting intervention models that have the potential to bring positive results for the community. In other words, impact finance seeks to generate social impact in a way that also provides financial returns, offering a good alternative to philanthropists who are looking to go beyond traditional grantmaking and leverage the power of markets to create change.

As an institutional and long-term investor, our foundation is developing an innovative impact finance platform, deploying a range of financial tools to invest private capital for public purposes (venture capital and private-equity funds, startups, accelerators, and incubators) in support of ideas and initiatives that create a measurable and positive economic, social, and environmental impact. The final goal is to achieve the best trade-off between impact and returns. Leading from this, assets are managed according to the principles of diversifying risk, which include stabilizing and increasing the real value of the portfolio in the long term. At the end of 2020, the total value of the Compagnia's portfolio, valued at market prices, was €6.7 billion. The current asset allocation includes direct investments,<sup>1</sup> investments in mission-related investments, and investments in funds managed by third-party asset managers according to our ESG policy.

<sup>1</sup> These are holdings in Banca Intesa Sanpaolo, which account for approximately one third of the portfolio's total market value, and in other institutions, such as the Banca d'Italia and the Cassa di Risparmio di Padova e Rovigo investment bank.

## Operations: Compagnia as a Local Developer

The SDGs are also being integrated into Compagnia di San Paolo's operations and procedures. Each project is associated with one or more SDGs and related targets, from the design phase through development and implementation (monitoring the established key performance indicators), in order to adapt short-term policies to the long-term strategic macro priorities. Applying a bottom-up approach, the new framework is also crucial in supporting the foundation's governance and management board in its budgeting activities. The allocation of funds in the annual plan allows us to quantify the spending by goal and mission in order to estimate their economic contribution in achieving the SDGs. This process — from SDGs to missions — is also an innovative way to organize and implement the internal reporting system, providing a cross-cutting overview, performance measurement, and, in the long run, a time series analysis.

For example, in 2021 we allocated €135 million (€500 million for 2021–2024) to nonprofits based in Italy's northwest regions of Piedmont, Liguria, and Valle d'Aosta: €36.4 million for Culture (four missions for 10 SDGs covered), €52.4 million for People (five missions for 11 SDGs), and €44.7 million for Planet (five missions for nine SDGs). The funded projects were supported not only by money donations, but also through partnerships, including public-private collaborations, that made Compagnia di San Paolo a real ecosystem developer. Consider these examples of three strategic approaches:

1. The call for proposals devoted to the topic of "Artificial Intelligence" (Planet goal) sustained three projects for a total of €3 million, promoting partnerships among nonprofit organizations, private companies, and public research institutions in the field of AI.
2. The call for proposals named "Piedmont Region/Sub-Saharan Africa" (People goal) is an example of a foundation that sustained projects far from its local area of intervention.

**TABLE 3** Overall Grants by Sustainable Development Goals in 2020

SDG	Annual Grant
1 No Poverty	€5.9 million
2 Zero Hunger	€1 million
3 Good Health & Well-Being	€11.3 million
4 Quality Education	€34.5 million
5 Gender Equality	€1 million
6 Clean Water & Sanitation	€200,000
7 Affordable & Clean Energy	€200,000
8 Decent Work & Economic Growth	€35.4 million
9 Industry, Innovation, & Infrastructure	€21.9 million
10 Reduced Inequalities	€22 million
11 Sustainable Cities & Communities	€25.2 million
12 Responsible Consumption & Production	€500,000
13 Climate Action	€300,000
14 Life Below Water	-
15 Life on Land	€1 million
16 Peace, Justice & Strong Institutions	€4.5 million
17 Partnership for the Goals	€3.4 million

3. The call for proposals related to "Switch" (Culture goal) is an example of how the foundation built a bridge between sectors often seen as disconnected: culture and technology. In this case, cultural institutions were encouraged to promote a path toward digitalization, identifying technological partners that helped them make substantive changes.

Finally, our analysis shows the distribution of grants by SDG in 2020. (See Table 3.) In a departure from what we observed overall in statistics from *Private Philanthropy for SDGs* (OECD, 2020), Compagnia's activity is focused on SDGs 8, Decent Work and Economic Growth; 4,

*The SDGs represent an opportunity to effect the challenging changes that so many foundations and charitable institutions are aiming to achieve.*

Quality Education; 11, Sustainable Cities and Communities; 10, Reduced Inequalities; and 9, Industry, Innovation, and Infrastructure.

### Communication and Accountability for Sustainability

Finally, we need a shared language that can be used to communicate with institutions, recipients, private stakeholders, and the public. Awareness, engagement, and empowerment to improve societal behaviors in response to rapid global socioeconomic changes are increasingly relevant. These require a new narrative for the meaning and value of sustainable development, how the SDGs interrelate across sectors, and what it will take to achieve those goals. Moving from a communication of sustainability to a communication for sustainability (i.e., encouraging sustainable behavior in all stakeholders and promoting our good practices to beneficiary organizations), our communications office has developed a wide-ranging plan that includes the use of social media (e.g., Facebook, Twitter, Instagram, LinkedIn) to proclaim that the SDGs are central to our vision over the long term, stimulate debate, and boost common engagement.

We can safely say that Compagnia di San Paolo can be viewed as embodying valuable philanthropic best practice and a good example of accountability, transparency, and responsibility. Our foundation has made a public commitment<sup>2</sup>

to contribute to this systemic effort, maximizing the impact of its core activity: The SDGs represent an opportunity to effect the challenging changes that so many foundations and charitable institutions are aiming to achieve.

### Goals, Targets, and Indicators: Measuring Impact

The Fondazione Compagnia di San Paolo has integrated the 2030 Agenda by looking at its past, present, and future from a strategic and technical point of view. The main aim has been to develop a systematic approach to measuring the impact of the philanthropic activity before and after the creation of the SDG framework. What follows are several approaches that we are using to demonstrate some strategies that philanthropy and the third sector as a whole can adopt to measure their impact on the SDGs.

### The Past: Alignment With the SDGs Before the SDGs

When the Compagnia di San Paolo was reorganized according to the 2030 Agenda, one of the first assumptions we made was that our philanthropic activity was already aligned with the 17 Sustainable Development Goals. The foundation has been working in the areas of poverty, education, and innovation for many years. We therefore decided to verify the extent of that alignment, analyzing the many projects implemented between 2015 and the beginning of 2019.

Using the descriptions of 5,140 projects submitted by grant seekers and supported by the foundation, we carried out a text-mining analysis, comparing these descriptions with a set of keywords related to the SDGs and measuring the similarity of each description to each SDG based on a similarity score index.<sup>3</sup> As expected, we found that Compagnia di San Paolo was already contributing to the SDGs before its reorganization, especially to SDGs 1, No Poverty; 2, Zero Hunger; 4, Quality Education; 5, Gender Equality; 8, Decent Work and Economic

<sup>2</sup> The foundation's annual budget is submitted to the supervisory authority of Italy's Ministry of Economy and Finance and publicly presented to all stakeholders.

<sup>3</sup> A complete description of the methodology and subsequent results are available in "Using Open Data to Monitor the Status of a Metropolitan Area: The Case of the Metropolitan Area of Turin" (Candela & Mulassano, 2021).



Growth; and 9, Industry, Innovation, and Infrastructure. Beyond this evidence, we found a strict correlation among SDGs which showed how, because of the interrelationship of poverty, employment, and education, we were able to have impact on several SDGs at the same time through the same project.

We therefore benefited from this research in several ways. First, we had empirical confirmation that our foundation was “compliant” and was impacting the SDGs even before the reorganization. This evidence was particularly useful to drive organizational change. Second, the data gave us a better understanding of our identity in terms of the issues addressed, the contribution of each department, interrelationships, the lack of investment in specific domains, and so on. Finally, we showed that the effort required to achieve the alignment with the SDGs was feasible and could be replicated by other foundations or nonprofits. The SDGs cover a wide spectrum, and it is quite unlikely that no contribution will be made to any of them. This was a crucial approach to understanding how our institution was impacting the SDGs and to designing solutions that were more relevant to the 2030 Agenda. Moreover, as previously mentioned, institutions can benefit from a deeper understanding of their activities. This was the case for the Compagnia di San Paolo.

### The Present: Monitoring Impact on SDGs in (Near) Real Time

Following the reorganization, the foundation implemented a systematic approach to monitoring the alignment of each project submitted by grant seekers. Now, each grant seeker that decides to participate in a specific call for proposals or to ask Compagnia di San Paolo for a contribution must indicate at least one of the 169 targets of the 2030 Agenda to which its project aims to contribute. This innovation allows us to monitor the contribution made by the foundation to the SDGs on a daily basis by noting the statements made by grant seekers. The analysis is detailed because we can access targets that are considerably more specific than SDGs. Moreover, we can perform statistical analysis, crossing data about targets and SDGs with other

*[E]ach grant seeker that decides to participate in a specific call for proposals or to ask Compagnia di San Paolo for a contribution must indicate at least one of the 169 targets of the 2030 Agenda to which its project aims to contribute.*

information, such as departments and year of contribution.

Embedding data about SDGs in our information systems allows us to develop a set of data that can be exploited in many ways. In addition to monitoring in near-real time the contribution our foundation makes to the SDGs through solutions like dashboards or reporting, our contribution to SDGs is becoming part of our annual report, by which Compagnia di San Paolo accounts for its philanthropic activity to stakeholders. Historically, the foundation has described its annual activity by publishing data about projects supported, euros donated through grants, and other information. Since 2020, the impact on the SDGs has become part of the foundation’s accountability. This addition has many benefits, including the opportunity to benchmark our activity to other institutions, thanks to the 2030 Agenda framework that is recognized and commonly applied around the world. And again, we are achieving our objective with limited effort and internal competencies, so we assume that our approach could easily be replicated by other institutions interested in monitoring their impact on the SDGs.

Another relevant project we developed to link our philanthropic activity with our region of activity and the 2030 Agenda involved the exploitation of open data — data covering a wide range of topics that are freely available to the public. Before the project was implemented, we carried out a pilot research project (Candela &



Mulassano, 2021) that highlighted the relevant potential of open data to analyze the territory and subsequent evidence-based strategic decisions. Following this research, we found a match between our thematic missions (environment, innovation, social housing, culture) and the 17 SDGs. We then scouted to identify open data significantly related to Compagnia di San Paolo's missions. Fourteen dashboards powered by open data are currently in production; we have collected data related to the last five years and periodically update the dashboard system as new data become available (monthly, quarterly, or annually). A set of information based on the connections among philanthropic domains, the SDGs, and open data is now available to Compagnia di San Paolo as a whole and, potentially, to our community. This is an example of how open data can be exploited and how they can be organized, harmonizing the internal organization of a foundation with the 2030 Agenda and allowing a deep understanding to be gained of the region in which the foundation operates.

### The Future: Tuning the Current Approach to Gain Better Knowledge

In the context of the Compagnia di San Paolo's attempts to systematically align its organization with the SDG framework, we can also present some of the solutions we have developed to map, through data, the impact of our philanthropic activity on the SDGs. Despite the high level of innovation, there are obviously several areas where we can improve our approach.

One of those areas is measurement of the foundation's impact. The current monitoring system is based on statements made by grant seekers; these statements may not be completely reliable. The foundation's program officers could be instructed to verify their accuracy — although that would have a significant impact on their daily work, considering the 2,000 project proposals submitted each year. It might also be useful to consider asking for additional data about the SDGs and goals achieved at the end of the project, when it is probably easier to provide a reliable report.

Another possibility for improvement is in expanding the use of these data. One of the 2030 Agenda's crucial contributions is in providing a global common framework for institutions. But individual organizations can use data about the impact of their own activities on the SDGs not only for internal purposes, but also to determine “shared organized impact”: comparing their work with those of other organizations, which allows them to identify where they are making an impact and where they are not. It is precisely for this reason that Compagnia di San Paolo should start comparing its impact with those of other institutions in Italy's northwest, its main area of intervention. This will allow the foundation to strengthen its collaboration with other institutions and increase the overall impact on all SDGs.

### Incorporating the SDGs: Benchmarks from European and U.S. Foundations

We have discussed how Compagnia di San Paolo has aligned its work with the 2030 Agenda by making structural changes in operations, finance, grantmaking, monitoring, and impact evaluation. The entire activity of the foundation is currently driven by the framework defined by United Nations. Obviously, the choice of adhering to this framework was strategic and vocational. Many institutions, in the public and private sectors, have also adopted such radical organizational change; many others have focused greater attention to SDGs without such significant restructuring.

To complete our examination of the transformation of a philanthropic foundation to an SDG-aligned institution, we conducted a benchmark analysis involving nine case studies of foundations — in Italy, elsewhere in Europe, and in the United States — to identify the level of engagement and alignment of each with the 2030 Agenda framework. The sample comprised three U.S. philanthropies, the Bill & Melinda Gates, Rockefeller, and Ford foundations; the Novo Nordisk Foundation, Stichting INGKA Foundation/IKEA Foundation, Wellcome Trust, and Robert Bosch Stiftung in Europe; and two other Italian foundations of banking origin. The first, Fondazione Cariplo, is similar to

**TABLE 4** Foundation Alignment to 2030 Agenda: A Benchmark Analysis

Foundation	Country	Mission Alignment With 2030 Agenda	Explicit Attention to and Alignment With SDGs	Documents That Mention SDGs
Compagnia di San Paolo	Italy	High	High	All institutional reports
Fondazione Cariplo	Italy	High	Medium	Annual report
Fondazione Cassa di Risparmio di Torino	Italy	High	Low	None
Novo Nordisk Foundation	Denmark	High	Low	Grant report
Robert Bosch Stiftung	Germany	High	Medium	None
Stichting INGKA Foundation/ IKEA Foundation	Sweden	High	Low	Annual report
Wellcome Trust	U.K.	High	Low	None
Bill & Melinda Gates Foundation	U.S.	High	High	Goalkeepers Report
Rockefeller Foundation	U.S.	High	High	Ad-hoc report
Ford Foundation	U.S.	High	Low	None

Compagnia di San Paolo in terms of endowment and amount of grants; the second, Fondazione Cassa di Risparmio di Torino, is the third largest foundation of banking origin per asset in Italy, after Cariplo and Compagnia di San Paolo. The selection of the European and U.S. foundations was based on the relevance of the institutions in terms of assets, resources distributed, and reputation.

The benchmark analysis dealt with three key dimensions:

1. the alignment of the foundations to the framework of SDGs in terms of mission and strategic activities;
2. the explicit interest in and alignment demonstrated with SDGs in such areas as topics, organization, and communications; and
3. the presence of SDGs in the foundations' institutional documents, especially annual

reports, the official websites, and, for further insights, additional online resources.

For each of the three dimensions we assigned a score of “low,” “medium,” or “high.” It is crucial to underline that these scores did not represent a judgement or an evaluation. The 2030 Agenda is a framework proposed by United Nations to summarize the challenges for a better future and to share a common global framework. The lack of adherence to this proposal does not imply a negative attitude on the part of an institution — only a strategic decision. Moreover, several studies (Shridar, 2016; Easterly, 2015) that have critically discussed the framework have found that these decisions were made based on perceived effectiveness and usefulness. (See Table 4.)

In our first dimension of analysis, all foundations were found to be unequivocally contributing to the 2030 Agenda and Compagnia di San Paolo had the highest level of alignment with the SDGs. We did not find a similar case

among the sample we considered; none of the other foundations demonstrated such a high level of reorganization toward and pervasiveness of SDGs.

Regarding overall alignment with the 2030 Agenda, all foundations in our sample had missions aligned with the SDGs, and for two main reasons: The wide spectrum of activity covered by the goals creates a high probability that every foundation can make some contribution; and the foundations' substantial resources allow them to fund different domains coherent with SDGs. The magnitude of contribution for each goal varied. The work of the Fondazione Cariplo and Novo Nordisk, for example, is benefiting some SDGs more than others.

In the second and third dimensions — explicit declarations about SDGs and the frequency of discussion about the topic on websites and institutional documents — many interesting differences arise in at least two subgroups and one specific case study.

The first group consists of those foundations that showed limited or absent attention to the 2030 Agenda: Fondazione Cassa di Risparmio di Torino, Wellcome Trust, and the Ford Foundation. We find few references to SDGs on their websites and no explicit mention of the framework in their reports. The second group comprises foundations that demonstrated attention to and interest in the alignment of their activities with SDGs, especially with references in annual reports or through institutional partnerships. Annual reports from Cariplo, Novo Nordisk Impact, and INGKA Group attempted to highlight their contributions to various SDGs, but most discussion was limited to few pages. The Rockefeller Foundation and Robert Bosch Stiftung expressed their interest in SDGs in a different way, focusing primarily on partnerships with other institutions, support for work related to the framework, or publishing research on the topic.

The Gates Foundation is a unique case, because it has devoted a specific area of its website to its Goalkeepers effort. The effort not only involves

monitoring progress toward SDGs, but also asserting the intention to serve as “a catalyst for actions toward these goals — bringing together leaders from all around the world to make progress toward ending poverty and fighting inequality” (Bill & Melinda Gates Foundation, n.d., para. 1). Goalkeepers is one of the most relevant efforts found in our study.

The analysis has some limits, due to the availability of information on the official website of each foundation. There are many resources for data on alignment with the SDGs, and it is possible that we have missed some of them. For instance, we found that the Ford Foundation is part of the Global Partnership for Sustainable Development Data network, but there is no mention of this partnership on its website. Nevertheless, some general insights can be collected from the study of our sample:

- Two foundations, Compagnia di San Paolo and the Gates Foundation, have demonstrated alignment of their philanthropy with the SDGs. Compagnia did so through a reorganization; Gates dedicated a specific effort to monitoring of, advocacy for, and partnership in furtherance of the SDGs.
- Some foundations seemed to lack a strong dedication to the framework: no information, declarations, documents, or web pages were specifically found to reference the goals.
- Many foundations are progressing toward a greater alignment and highlighting their contributions to the SDGs.

## Conclusion

In 2020, Compagnia di San Paolo launched a major project to align its organization and activities with the universal framework of the U.N. Sustainable Development Goals. It was the first foundation of banking origin in Italy, and among the first foundations in the world, to do so. One year later, some general observations can be made:

- As confirmed by our analysis, the 2030 Agenda is now the foundation's main reference model.
- Over time, we have implemented a decision support system to monitor convergence with the objectives defined by the United Nations.
- We are now accelerating our transformation from a grantmaking foundation to an operational and data-driven foundation, which we see as the best way to be useful to the interests of our local community and for the common good.

Our analysis obviously requires additional case studies and a deeper look at the foundations in our sample. For now, however, there are a few additional questions worth posing to the management of those foundations: Are you currently benefiting from your choice to adhere to the 2030 Agenda? If so, what are the main benefits? For those are still devoting limited attention to the SDGs, why is this so?

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# A Case Study on the Use of the SDGs With a Collective Impact Initiative in Southwest Florida

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**Keywords:** *Collective impact, Sustainable Development Goals, systems change, stakeholder engagement, community mobilization*

## Think Globally, Act Locally. How Do We Do That?

Achieving an audacious community-level goal is difficult because of the multidimensional complexity of social problems and relationships. But the experience of the FutureMakers Coalition (FMC), a regional collaborative network focused on systems change, suggests it is not impossible. Achieving such a goal requires thinking about the big picture and community systems; that's why the first step is to think globally and multidimensionally while acting locally, untangling systems through relationships. This article offers insights into one way to tackle such a goal.

The FMC's goal is increase the percentage of working-age adults in Southwest Florida who have the credentials needed to fill jobs from 39% in 2013 to 55% by 2025. The coalition combines the blueprint of the Sustainable Development Goals (SDGs), the collective impact model, and the CivicLab Stakeholder Engagement Process (SEP) to change relationships in order to achieve local outcomes that are aligned with global goals. This approach helped the region earn a competitive Talent Hub designation from the Lumina and Kresge foundations, acknowledging the way the coalition's partners work together as one of 25 national exemplars (Lumina Foundation, 2020).

In this case study, participants came to understand that community-level social, economic, and environmental problems cannot be solved by a single entity, and that the collective impact model is one important collaborative

## Key Points

- The United Nations Sustainable Development Goals can be a useful framework on which to design, evaluate, and communicate collective impact initiatives. Using as a case study the FutureMakers Coalition, a collective impact initiative launched by the Southwest Florida Community Foundation to transform its region's workforce, the field can gain insights into how the goals can strengthen collective impact work locally and nationally.
- This article will discuss how the foundation facilitated the setting of a common agenda and the use of the Sustainable Development Goals to help build consensus among 251 active partners on how to measure progress toward the coalition's shared goal. By aligning program design and evaluation with the goals and agreeing to key indicators, each coalition member understood which data needed to be collected and when to establish baselines and measure outcomes and impact. Annual assessments were shared with the coalition and the public. This approach, using the Sustainable Development Goals as a framework, helped build teamwork, trust, and presence, allowing cross-sector community partners to spend significantly less time aligning separate agendas and metrics.

*(continued on next page)*

tool. In efforts to create systems-level change, philanthropic organizations — community foundations in particular — are finding in this

model a process by which community goals can be reached. As a result, foundations are playing a variety of roles in collective impact initiatives across the United States.

Communities often miss opportunities to both improve local collective impact work and build capacity for meaningful and sustainable change across the globe. This may be because philanthropy has not fully understood the value and power of aligning its work with the SDGs, adopted by the United Nations in 2015 as a framework and time-sensitive call to action for a more sustainable future by addressing all interconnected global challenges (United Nations, 2021a). Local foundations are uniquely positioned to facilitate effective collective impact initiatives that produce outcomes with global goals in mind but with a meaningful local match — a demonstration of a collaborative’s skill in establishing itself as the “go to” group in a community and a symbol of the broader community’s willingness to embrace a collaborative and its mission (Frusciante & Siberon, 2010). The work of collaboration and facilitation is positioned within networks and by way of collective impact to address social problems, achieve economies of scale, and inspire innovation. Making local connections and enhancing regional visibility provides better solutions and cultivates a peer network (Millesen, 2015).

The Southwest Florida Community Foundation provides backbone support to the FMC and used the SDGs to design a now seven-year-old collective impact initiative. This article shares a programmatic process that has demonstrated that the SDGs and the five conditions of collective impact are complementary and, together, can advance both global and local action for positive change. It also illustrates the important role community foundations can play in guiding and facilitating community collaborations to achieve systems change.

### **Integrating Sustainability and Collaboration**

The United Nations 2030 Agenda for Sustainable Development, adopted in 2015, “provides a shared blueprint for peace and prosperity for

*The coalition combines the blueprint of the Sustainable Development Goals, the collective impact model, and the CivicLab Stakeholder Engagement Process to change relationships in order to achieve local outcomes that are aligned with global goals.*

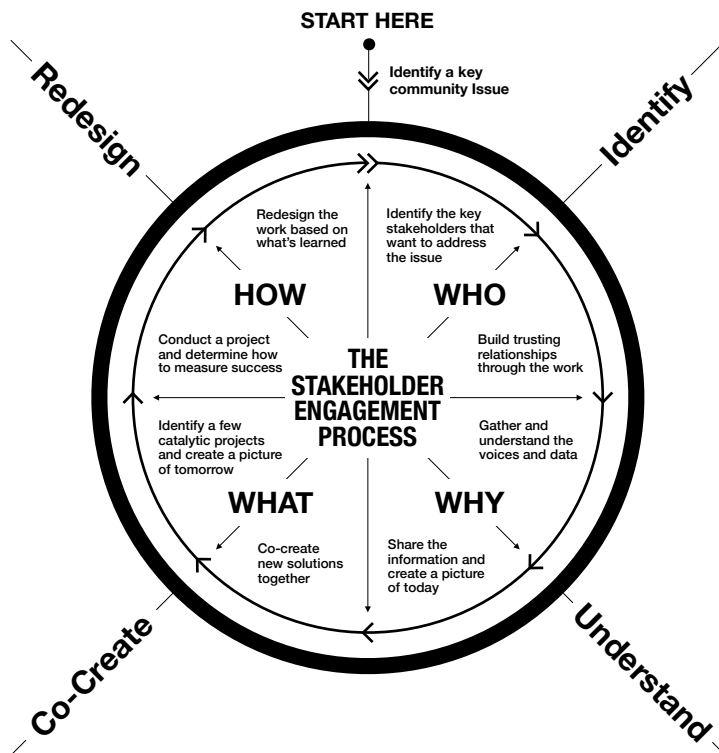
#### **Key Points** (continued)

- Design and assessment centered on the Sustainable Development Goals can expedite organizing and reporting for collective impact and provide foundations with an important formative role in program design and evaluation. This article illustrates the need for cross-sector collaboration to solve complex problems, and how setting a common goal is just one step in keeping a diverse group of stakeholders moving in the same direction and making data-driven decisions.

people and the planet, now and into the future” (United Nations, 2021a, p. 1) through 17 SDGs and 169 targets that represent a global common agenda. The goals’ scale and interconnectivity makes collaboration among local, national, and global stakeholders essential to the SDGs’ achievement. While there is growing attention to the goals, the framework is too often overlooked as a tool for solving community problems.

Drawing on a handful of initiatives that were using highly collaborative structures to address large-scale social problems, Kania and Kramer (2011) posited the Five Conditions of Collective Success: a common agenda, shared measurement, mutually reinforcing activities,



**FIGURE 1** CivicLab's Stakeholder Engagement Process

continuous communication, and the presence of an organization providing backbone support. These conditions set collective impact apart from simple collaboration. As Hanleybrown, Kania, and Kramer stated, “More and more people ... have come to believe that collective impact is not just a fancy name for collaboration, but represents a fundamentally different, more disciplined, and higher performing approach to achieving large-scale social impact” (2012, p. 3). As such, collective impact has become more commonplace in the realm of lasting, systems-level change.

### The Stakeholder Engagement Process

Implementing the SDGs and setting the conditions for collective impact can present ambiguities and other, sometimes overwhelming, challenges, leaving communities unsure about how to proceed (Frusciante & Siberon, 2010). At the same time, both are built on

collaboration aimed at solving our world’s most pressing problems. They become most powerful when used together, but to do so requires a structured process. As Nichols, Schwan, Gaetz, and Redman (2021) found, success in collective impact is about multisectoral partnerships, strategic information sharing, and ongoing attentiveness to the relational dimensions of systems-change efforts.

CivicLab, a nonprofit institute dedicated to advancing the practice of civic collaboration, discovered the Stakeholder Engagement Process (SEP), a rigorous and transparent methodology for multisector collaboration. A relationship-based, systems-building approach to addressing complex social challenges and opportunities by redesigning the way people work together, the SEP was identified by examining a 70-year community transformation effort in Columbus, Indiana. (See Figure 1.)

**FIGURE 2** CivicLab's Guiding Team Roles and Responsibilities

The process begins by identifying a key community issue or opportunity that brings people together to accomplish something that can only be achieved together. Communities as small as a few neighborhood blocks and as large as multistate regions, and with partners that include public agencies, private companies, private-public partnerships, and multisector collaborations, have used the SEP effectively over the past decade to address a variety of complex social challenges: strengthening the education and workforce pipeline; reforming the juvenile justice system; improving access to mental health resources; pursuing private philanthropic resources for multiple organizations; reducing homelessness to functional zero; coordinating

pandemic response resources; designing the built environment in public spaces; and creating plans to use federal and state stimulus and recovery dollars.

Once the challenge or opportunity is identified, the focus turns to identifying relationships among the stakeholders and organizations that constitute the system. Then, a question is asked: "Who wants to come together to address a common challenge?" By making these often-invisible relationships visible through the SEP, a guiding team comprising members most adjacent to and able to address the common issue can work on the system, as opposed to working in it. (See Figure 2.)



*[P]artnerships explore ways to carry out their collective plans, including restructuring existing organizations, sharing previously siloed resources, and reshaping relationships among stakeholders. The core principle of the SEP directs partnerships to co-design and implement with people, rather than doing things to or for people.*

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The “why” phase of the SEP allows partnerships to investigate and understand what they know and don’t know about a given issue. Primary and secondary data are employed throughout this phase as the partnership continues to make the system visible by attaching data to the sets of relationships that are adjacent to the common issue. The partnerships then proceed to the third quadrant, the “what” phase, where approaches to redesigning the system are co-created. Here, stakeholders focus on this question: “What can we do together that we cannot do alone?” Importantly, the pilots and processes that emerge in this co-creation phase focus on the system (i.e., the set of relationships) rather than on providing a direct service or response to the challenge.

Finally, partnerships enter the “how” stage of the SEP, where the focus is on redesigning the relationships among people and organizations. Here, partnerships explore ways to carry out their collective plans, including restructuring existing organizations, sharing previously siloed resources, and reshaping relationships among stakeholders. The core principle of the SEP directs partnerships to co-design and implement with people, rather than doing things to or for people.

## **Implementing the Ambiguous: A Case from Southwest Florida**

Southwest Florida is a five-county region that includes the rural Hendry and Glades counties and the suburban, coastal Charlotte, Lee, and Collier counties, where sprawling postwar development created a landscape heavily reliant on personal automobiles. The economy of the coastal communities, which draw retirees and see an influx of transient populations during the winter months, is subject to extreme fluctuations, vulnerable to various social and environmental conditions and events, and relies heavily on construction, tourism, and health care. The agriculture-based communities face a number of these same problems, but on a magnified scale. Hendry County has had one of the highest unemployment rates among Florida’s 67 counties for years. Those who live there face steep educational barriers, and many of the area’s well-paying jobs are held by commuters. Glades County has about 12,000 residents and even less access to local services, training, and jobs because in Glades, they simply don’t exist.

Seven years ago, Southwest Florida had fewer than 1 million permanent residents, making it difficult to attract the opportunities and investment necessary to address regional challenges. The region also faced overwhelming competition from Tampa and Miami, the nearest major metropolitan areas. Individuals seeking services and resources were confronted with a maze of competition and duplication: The region is home to nearly 2,000 nonprofits; multiple municipalities and corresponding economic development councils; at least 16 Chambers of Commerce; five school districts, and a variety of postsecondary institutions. Nearly 90% of the region’s businesses were small operations with 25 FTEs or less (more likely, 10 FTEs or less). Meanwhile, data emerged from the Florida College Access Network (2020) showing that by 2025 at least 60% of the jobs in the state would require a credential beyond a high school diploma, prompting recognition of the immediate need for and context of a significant shift in thinking about, and working together to ensure, the region’s sustainable future.

### A New Approach to Impact

Given this landscape in 2014, the Southwest Florida Community Foundation made a renewed commitment to a regional focus and began to assess where it might make an impact. The foundation identified two key areas, education and economic development, as the region's biggest challenges, and seized the opportunity to test a hypothesis that moving the needle in these areas would happen only through a collaborative, five-county effort.

Coincidentally, the foundation had recently partnered in a local government effort to assess sustainability and ultimately added a professional in that field to its grantmaking and programs team. This created a parallel opportunity to test how the SDGs could play a role in the foundation's work, and put the findings of the community assessment into a new light — education and economic development became more than just Southwest Florida's challenges. The work ahead would also be aligned with the corresponding SDGs: Quality Education (SDG 4), Decent Work and Economic Growth (SDG 8), and Reduced Inequalities (SDG 10).

In response to national trends in financial aid gaps (Kofoed, 2014), the foundation launched the FMC with a collaboration-dependent project designed to increase completion of the Free Application for Federal Student Aid (FAFSA). The project, which was time-limited and whose outcomes were easy to measure, spanned five counties and high schools and was a quick win in demonstrating that working together could change outcomes.

That collaborative effort drew technical assistance and financial support to the region from the Lumina Foundation, which also named Southwest Florida one of 75 communities across the country, and one of four in Florida, to the Community Partnership for Attainment. Built on the pillars of partnership, health, equity, and attainment, Lumina's Community Partnership for Attainment aimed "to deepen the impact of cross-sector, place-based efforts to increase higher education attainment in communities and cities across the country" (Lumina

*Using a sustainability lens to see the region's problems and their interdependencies enabled the coalition to identify those most directly relevant to achieving a shared goal. Viewing the region as a social and economic ecosystem helped ensure a comprehensive agenda and avoid unintended consequences, as all problems and solutions are synergistic.*

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Foundation, 2015). This partnership became a catalyst for a new way of working together in the region.

Some of the region's leaders took notice and came together to develop a charter that would take the FMC from a project to a systems-focused, regional initiative aimed at transforming the area's workforce by increasing to 55% the number of residents age 25 to 64 holding credentials needed to fill in-demand jobs by 2025. With this shared goal, the foundation entered uncharted territory, becoming the backbone organization for the region's first collective impact initiative.

### A Bold Goal: Moving to Action

The FutureMakers Coalition had a bold goal and a growing number of partners in education, workforce, and economic development, but needed to further define the common agenda and identify shared measurements in order to begin to understand the systems. Using a sustainability lens to see the region's problems and their interdependencies enabled the coalition to identify those most directly relevant to

**FIGURE 3** FMC's Translation of Global Goals to Local Outcomes

achieving a shared goal. Viewing the region as a social and economic ecosystem helped ensure a comprehensive agenda and avoid unintended consequences, as all problems and solutions are synergistic.

It is valuable to point out that the foundation had already established a local language for the SDGs, which consisted of locally measurable indicators that aligned with the global goals. The Board of County Commissioners in Lee County had used the STAR Community Rating System (now known as LEED for Cities and Communities) to create a baseline assessment of the community's sustainability and developed a plan that prioritized 14 indicators, including education and workforce readiness (Lee County, 2012). Although the plan was developed by more than 88 partners and established a local language for sustainability, the effort lost political support and was shelved. Around the same time as FMC's development, the foundation agreed to take on the sustainability plan as a convener and for use in advancing outcomes regionally. The Foundation further distinguished the local language by aligning the STAR goals with philanthropic areas of focus. (See Figure 3.)

Having a local language and indicators to translate the SDGs to align with community needs proved extremely helpful in developing a common agenda and shared measurements. For the FMC, the local language for the attainment goals were Education; Economy & Jobs; and Equity & Empowerment. The foundation utilized this local language to identify stakeholders who were missing from the table and to begin mapping out our shared measurements. Stakeholders were also better able to self-identify as partners in the initiative because they could see where their work aligned with the high-level goals and systems within which we were working.

### Developing a Common Agenda

The FutureMakers Coalition is working toward a common agenda that is focused on three SDGs: Quality Education (SDG 4), Decent Work and Economic Growth (SDG 8), and Reduced Inequalities (SDG 10). It was by analyzing the local-level outcomes provided by the STAR Community Rating System and examining the aligned SDGs that it became clear that systems change would require defining the talent pipeline from early childhood education

through under- and unemployed working-age adults. Furthermore, the coalition would need to intervene to change policies and practices so that those already in the pipeline would have improved outcomes, and to examine what was needed to improve outcomes for all yet to enter the pipeline. This is because of the interconnected nature of the outcomes.

For example, kindergarten readiness is a key indicator for grade-level reading proficiency. By the end of third grade, students not reading at or above proficiency standards are four times less likely to graduate high school on time; students from low-income families who fall short of those standards are six times less likely (Hernandez, 2011). According to the Florida College Access Network (2020), Floridians with a bachelor's degree earn more each year on average than those with only a high school diploma. With that in mind, the parents or guardians in lower-income families are less likely to hold a credential beyond a high school diploma and may not even have a high school diploma. These outcomes contribute to a cycle of poverty that is difficult to break without changing the systems perpetuating it.

This sustainability analysis helped solidify the common agenda needed to ensure early childhood education was at the table. The FutureMakers Coalition also needed to develop opportunities to change the system for adults with some college but no degree and for those without postsecondary experience. Furthermore, the SDGs' focus on equality in outcomes drove the FMC to disaggregate data and prioritize equity in changing systems to reach a shared attainment goal. The SEP was employed during this period and has been utilized throughout the evolution of the FMC's work. Both the "who" and the "why" phases of the SEP process are important in convening the necessary stakeholders and facilitating a conversation about how the system is producing the current results. (See Figure 1.)

The overarching approach of using the SEP with the SDGs to understand a problem and determine a focus has had two significant effects on

the FMC collective impact initiative. First, the ranks of the coalition's actively engaged partners has grown to over 250 regional, multisector stakeholders, bringing a variety of perspectives and more opportunity for novel ideas about the work. Second, the stakeholders more clearly understand the focus on systems and the need to change the way we work together. They can see where a common agenda and collaboration can help them achieve their missions and attain their goals. They can visualize where they fit in and how systems-change and collaboration are required to increase impact.

### Establishing Shared Measurements

The FutureMakers Coalition's shared measurements were developed through a participatory process that included the development of the Lumina Foundation Charter for Southwest Florida and meeting with FMC partners that work all along the talent pipeline (Banyai, 2016). Many of the shared measurements selected through this process came from the previous STAR rating system as well as the partners and others identified in communities doing similar work.

The process of using local indicators for the SDGs proved invaluable. The five counties in the region have varying levels of access and capacity to track data, so using accepted data points generally allowed us to align our measures with information that the FMC's data and reporting team, in partnership with WorkforceNow (a collaborative research team from Florida Gulf Coast University, Florida Southwestern State College, and Hodges University), could access without burdening partner organizations with tracking new information or requiring data-sharing agreements prior to having fully established trusting relationships.

More than 65 partners participated in this process. With that much input early on, the FMC established indicators much more quickly than if it had not explored possible shared measures through the lens of sustainability, and the work remained aligned with the SDGs. Since then, the coalition, which established 2013 as its baseline

year for reporting change, has completed an annual report each year.

Over time, the “what” component of the SEP helped partners focus on co-creating the path to improving the community conditions, creating a regional approach to achieving the outcomes of the aligned SDGs, and fostering a level of engagement beyond the typical volunteer model that changes the way we work as a region. By envisioning what we could accomplish in terms of outcomes, our ability to establish shared measures was accelerated and enhanced.

### Mutually Reinforcing Activities; Continuous Communication

Setting the conditions for mutually reinforcing activities and continuous communication takes time, practice, and feedback. The FMC strives to use our local language for the global goals in aligning work with the SDGs, with an eye on avoiding duplication and sharing best practices. As Kania and Kramer observe:

The power of collective action comes not from the sheer number of participants or the uniformity of their efforts, but from the coordination of their differentiated activities through a mutually reinforcing plan of action. Each stakeholder's efforts must fit into an overarching plan if their combined efforts are to succeed. (2011, p. 40)

The move toward these conditions was supported in the “how” phase of the SEP. Partners started small and piloted projects together, crossing organizational and jurisdictional boundaries and using existing shared assets to achieve co-created solutions. If a solution proved successful based on data, the project was shared with the rest of the FMC and became the catalyst for policy change. The coalition communicated these efforts in a variety of ways, including its website, a newsletter, social media, and at systems-focused quarterly meetings.

After nearly seven years, partners own this work, leadership is distributed, and testing new ideas is significantly easier. One tool that was developed to create the conditions for mutually reinforcing activities and continuous

communication is the FMC's Collaborative Structure (FMC, 2021a). (See Figure 4.) Constantly updated, which keeps the system visible to stakeholders, the tool also allows new partners to plug in easily and new solutions to be piloted without duplication. It also empowers partners to help others engage and bring aligned ideas to the collective work, rather than start something new with fewer resources and a without a full understanding of what the network has already learned.

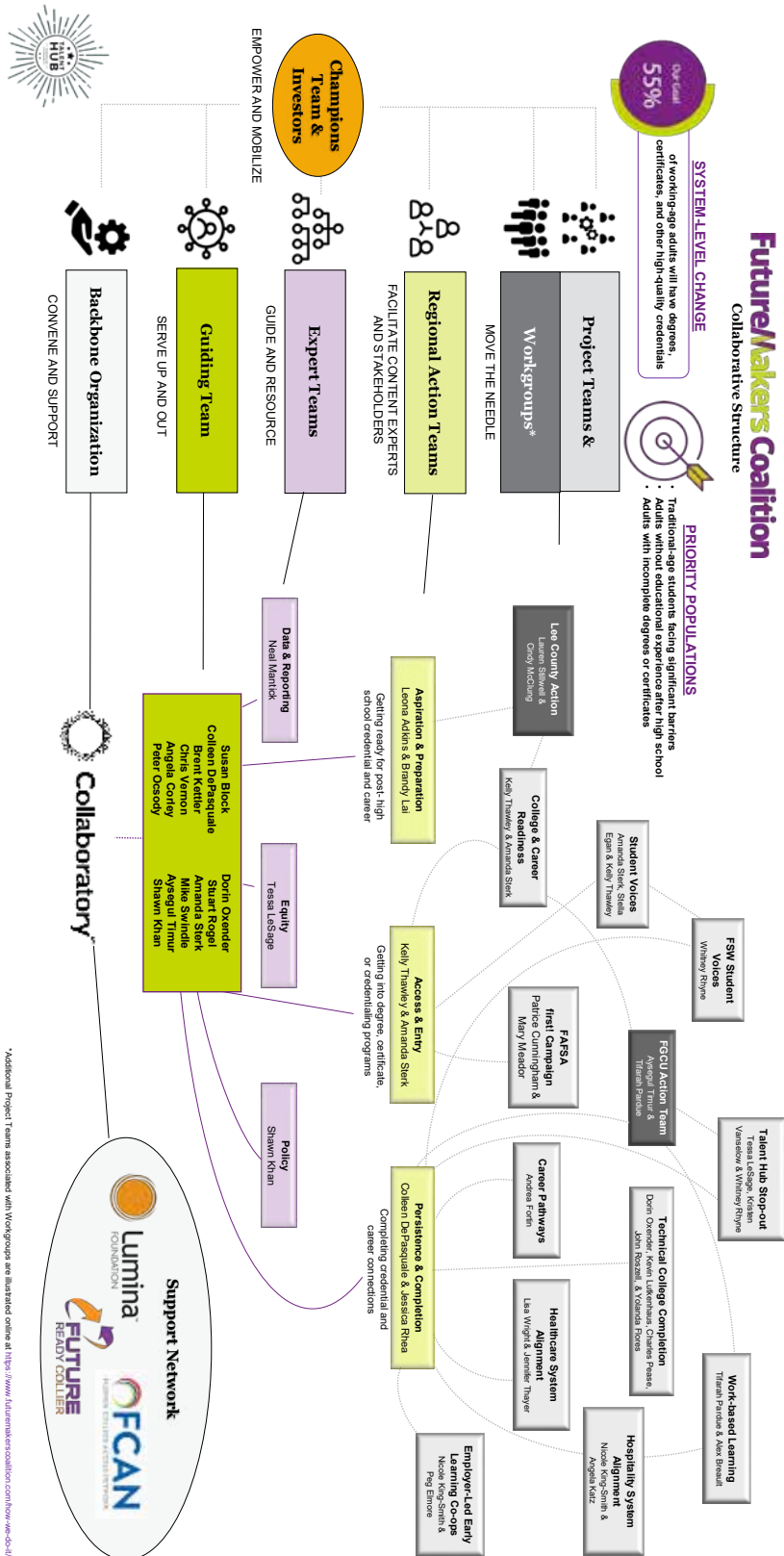
### Backbone Support

The FMC's progress is due in large part to the foundation's backbone support. Its use of the blueprint of SDGs and setting the conditions for collective impact have been critical to engaging partners and creating the context for collaboration. The incorporation of CivicLab's SEP over the years, including its application to build the capacity of guiding team members and leaders from partner organizations, has played a significant role. Achieving the five conditions for collective impact requires a highly structured process that leads to effective decision-making (Kania & Kramer, 2011), and, at the same time, the unique capacity of the FMC's backbone organization to understand and simultaneously seize the opportunity to incorporate the SDGs into this work was crucial.

The foundation faced a number of challenges in this role. Initially, its responsibility as the backbone organization went far beyond the role of a supporting partner. For the first several years, the foundation had not mastered the process for distributing leadership and ownership of the collective work, which may explain why organizations that are well positioned to provide backbone support are reluctant to step into or remain in this role. This shortcoming created several significant challenges, including a lack of collective ownership of the work and conditions that spread the staff far too thin to be effective. Addressing these challenges required changing the relationships within the FMC. Fuller implementation and network capacity building around the SEP was the key to resolving these problems and distributing leadership. Also, aligning the work with the SDGs was and is



FIGURE 4 FMC's Collaborative Structure



**TABLE 1** STAR Communities/LEED Scores: 2014 and 2019

STAR Communities/ LEED for Cities and Communities Goal Area	2014 Final Score Lead Agency: Lee County	2019 Final Score Lead Agency: Southwest Florida Community Foundation	Percentage Change
Built Environment	50.7%	59.8%	18%
Climate & Energy	51.1%	17.3%	-66%
Economy & Jobs	30.8%	58.6%	90%
Education, Arts, & Community	43.6%	72.6%	67%
Equity & Empowerment	29.5%	62.4%	112%
Health & Safety	43.2%	62.2%	44%
Natural Systems	61.7%	52.4%	-15%
Innovation & Process	38.0%	36.0%	-5%
<b>TOTALS</b>	<b>44.0%</b>	<b>53.8%</b>	<b>22%</b>

Source: Wallace, Stauring, Ryals, LeSage, & Leone (2021, p. 245)

critical to creating the sense of shared ownership throughout the network.

In addition to the regional indicators established as shared measures, the FMC assesses partnership health as a measure of partner satisfaction, engagement, and impact on partner organizations, as well as a mechanism to gather feedback. This most recent effort assessed partnership health among 250 active partners representing more than 140 organizations. The *FMC Partnership Health Report* (2021b) conveys the partners' perspective on the coalition's shared work and describes the network's makeup, illustrating the strong cross-sector representation within the five-county region. The report contains other significant findings:

- 97% of partners feel their relationship with the FMC has the potential to make a significant impact on the region's educational and economic well-being.
- 60% indicate they have changed their work since establishing a relationship with the coalition.

- 41% reported that they have changed policies and practices — most commonly those concerning efforts toward equity and diversity and better serving students — since partnering with the coalition (FMC, 2021b).

Changing the way we relate to and work together appears to be a key strength for the coalition and has proven central to its efforts to achieve SDGs and collective impact goals.

### Is the FMC Moving the Sustainability Needle?

After seven years of changing the way we work together and designing our shared work around the connections between local solutions and global goals, it's important to assess the FMC's impact on our community's sustainability.

The STAR Community Rating System provided our local language for the SDGs. (See Figure 3.) Using that system, Lee County was certified as a 3 Star Community in 2014, aligning with the year work began to establish FMC; in 2019, the foundation recertified the county under the updated LEED for Cities and Communities

rating system. (See Table 1.) With a focus on where the community set the conditions for collective impact to progress toward greater sustainability through the FMC's framework, it is noteworthy that the areas that showed some of the greatest improvement were those whose outcomes were aligned with the coalition's: Equity & Empowerment, Economy & Jobs, and Education (Wallace, Stauring, Ryals, LeSage, & Leone, 2021). These outcome areas are aligned with Reduced Inequalities (SDG 10), Decent Work and Economic Growth (SDG 8), and Quality Education (SDG 4), respectively.

### Lessons Learned

Achieving global goals happens at the local level, but requires community-level coordination, communication, and competence. The example of the FutureMakers Coalition illustrates that combining the SDGs with the conditions for collaboration and using a structured process can help achieve goals in a community and across jurisdictional boundaries. The SDGs are a blueprint and design framework. The collective impact model supports the conditions for collaboration to solve complex problems. These can be ambiguous on their own, but when used together along with a structured process like the SEP, they become powerful tools for efficient and effective progress toward audacious community goals. The SDGs reflect the interconnectedness of the world's challenges, creating opportunities to support additional collective impact initiatives as communities increase capacity to work together to solve problems. As more communities incorporate SDGs into collaborative initiatives, the collective progress toward global goals will grow.

- *Lesson 1: The SDGs are a call to action and valuable assets in the design, assessment, and implementation of collective impact partnerships.* For new collaboratives, the SDGs should be viewed as an asset in designing, setting the conditions for, and continuously improving collective impact initiatives, and as an opportunity to effect change on a larger scale. As seen in the case of the FMC, the goals were used as a design framework to establish common metrics, set a common

*The example of the FutureMakers Coalition illustrates that combining the SDGs with the conditions for collaboration and using a structured process can help achieve goals in a community and across jurisdictional boundaries.*

agenda, and gather stakeholders from several sectors and counties. Established collaboratives can use the SDGs during reassessment and evaluation, especially during redesign and strategic updating phases. For foundations, the SDGs provide a framework for impact, grantmaking, and capacity building. There is value in foundations increasing their comfort with using the SDGs to experiment, support goals, and scale impact both for the sake of those served and as a response to a global call to action aligned with philanthropy.

- *Lesson 2: The SDGs contribute to establishing the conditions required for collective impact.* As demonstrated by the FMC, the goals provide a framework to establish a common agenda, share measurements, and identify mutually reinforcing activities. They also provide a platform for continuous communication — especially in communicating the need, goals, and progress of the partnership. New and existing partnerships should consider adopting the goals as a framework to better align and communicate their work with a broader set of stakeholders. The SDGs provide a framework for community foundations to embrace leadership and step into roles as trusted partners and conveners. The SDGs can serve as a North Star, drawing partners together to solve a common goal.



## *The SDGs provide a framework for community foundations to embrace leadership and step into roles as trusted partners and conveners.*

- *Lesson 3: Systems change requires changing relationships among people and organizations, and can only be achieved by changing the way these relationships work.* The coalition brought visibility to the need for a collective impact approach by establishing a common agenda focused on three SDGs: Quality Education, Decent Work and Economic Growth, and Reduced Inequalities. Using these goals, individuals and organizations in the region were able to see how their work fit into the existing system, how they would need to change to make greater progress toward shared goals, and how it would be necessary to align with or create new relationships to change the system itself. The case of the FMC demonstrates how, rather than creating new programs to address common challenges, focusing on relationships builds sustainable collective impact structures that produce long-term positive change. Furthermore, in this case, the role of the Southwest Florida Community Foundation as the backbone organization was enhanced by the time spent building trusting relationships. While improving outcomes is important, changing the way we work together proved an essential first step to this work and addressing the challenges ahead.
- *Lesson 4: Like most global goals and frameworks, the SDGs must be translated for local relevance.* The goals intentionally require action across the spectrum, from individuals to global organizations. Such a wide-ranging framework can present challenges as local stakeholders attempt to align their work to a common agenda. Backbone organizations and guiding teams are advised to translate these global goals for local stakeholders and

may be best served by using other tools and frameworks alongside the SDGs. Leaders should consider exploring options for translation with the goal of efficiency and adding the most value for the community based on local conditions. Furthermore, by incorporating the SDGs and translating them to respond to local conditions, community foundations can better integrate collective efforts into their more traditional work. Along those lines, understanding the SDGs at the local level can make a clear case for foundations as backbone organizations in the collective impact model.

- *Lesson 5: Additional capacity building for backbone organizations and foundations is required.* As the fifth condition for collective impact, backbone organizations play an integral part in pursuing systems change. Foundations, particularly community foundations, are well positioned to convene stakeholders and provide backbone supports. As seen in the case of the FMC, capacity building among staff and guiding team members is necessary during both the design and implementation phases. Capacity building should focus on using and translating the SDGs to their local context and on the use of the SEP. Given the primacy of continuous improvement in both the SDGs and the SEP, continual capacity building is required as the partnership evolves and grows.

## **Conclusion**

Progress on global goals requires local action, and can only happen when individuals and organizations across sectors work collectively toward common goals. As seen with the FutureMakers Coalition, the adoption of model-agnostic frameworks like the U.N. Sustainable Development Goals and the Stakeholder Engagement Process hasten and improve systems-change efforts. Only by making visible the system of relationships that define our economic, education, and environment structures, and by aligning the work of local organizations with mutually reinforcing activities that further common goals, will we make the change needed to improve the human condition.

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# Walking the Talk on Sustainable Development Goals: The Case of Community Foundations in Canada

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## Introduction

Since the United Nations 2030 Agenda for Sustainable Development entered into effect (U.N., 2015), the promise presented by its Sustainable Development Goals (SDGs) for a more transformative philanthropy has been highlighted. From the side of academia, the capacity to address the roots of the structural problems at the core of the Agenda has been characterized as the cornerstone of radical philanthropy. Radical foundations address poverty or inequality by recognizing the central role of the current economic system in maintaining them and acknowledging their crosscutting dimensions (economic, social — race, gender, and class — and environmental). They aim at “fostering new economic institutions; tackling manifestations of colonialism by supporting local, grassroots initiatives; and combating racist and discriminatory laws, policies, and practices” (Herro & Obeng-Odoom, 2019, p. 884).

From a practical perspective, the SDGs open a window of opportunity for philanthropic actors to play collaboratively in the league of global challenges, regardless of geography, size, mission, and resources. On one hand, SDGs are universal, and “the work of any foundation, so long as it seeks to better humanity, is part of a larger global development effort” (Edwards & Ross, 2016, p. 9). On the other hand, and different from their anteceding Millennium Development Goals, the SDGs “incorporate all dimensions of development — economic, social, and environmental — and are equally applicable

## Key Points

- The United Nations 2030 Agenda creates an opportunity for philanthropic foundations to become more collaborative and transformative in their work toward global goals. Thus, since 2016, the extent to which foundations adopt the Sustainable Development Goals framework in their functioning has become a topic of interest. Although survey- and case-based research shows increased rates of self-reported adoption and several tools are available to help foundations to act toward the goals, there is a lack of systematic evidence about the purposes of and processes for adopting the goals among foundations.
- This void is particularly relevant for community foundations, as they have been proposed as natural champions for the 2030 Agenda. This article provides global and national context to the process of adoption of the goals by Canadian community foundations through a multiple case study, tracing it back to its origins and disentangling its antecedents, enablers, and effects during the early implementation phase. Special attention is paid to the roles played by collective action by Community Foundations of Canada, by grassroots actors, and by innovative practices in that process of adoption.

*(continued on next page)*

for all nations,” both domestically and internationally (Edwards & Ross, 2016, p. 6).

Therefore, the extent to which foundations adopt the SDG framework in their functioning is becoming a growing area of interest for researchers, policymakers, and practitioners. Scant available evidence shows increased rates of self-reported adoption accompanied by variations in the selection of priority SDGs across time and geography of grantees. In a survey of 544 foundations in 10 countries and Hong Kong, 55% indicated that they align their activities with the SDGs. Among the 335 foundations (over 80% located in Latin America) that identified which SDGs they prioritize, the goals of greatest interest were Quality Education (SDG 4, 57%), Good Health and Well-being (SDG 3, 42%), No Poverty (SDG 1, 35%), and Decent Work and Economic Growth (SDG 8, 34%) (Johnson, 2018).

Community foundations have been put forward as uniquely positioned to champion the 2030 Agenda and have starred in many accounts of successful adoption of the SDG framework (Community Foundations of Canada [CFC], 2020; Edwards & Ross, 2016; Ross, 2018; European Community Foundation Initiative [ECFI], 2020). However, the antecedents, enabling conditions, and outputs of SDG adoption are yet to be systematically explored. How does adoption originate in community foundations? How does adoption unfold in practice — what are the enabling factors and main purposes of implementing the framework? How do the first phases of implementation affect the work of the foundation vis-à-vis the community? This research aims at better understanding the antecedents, enablers, and early effects of SDG framework adoption by community foundations.

With that goal in mind, we developed a multiple case study for Canadian community foundations that scopes the national umbrella organization — CFC, with 191 members; and three foundations acknowledged as innovators for the SDGs: the earliest adopter, the Clayoquot Biosphere Trust, which manages the Biosphere Reserve in the Clayoquot Sound region of British Columbia; the London Community Foundation, which works across London and Middlesex County in Ontario; and the regional

*From a practical perspective, the SDGs open a window of opportunity for philanthropic actors to play collaboratively in the league of global challenges, regardless of geography, size, mission, and resources.*

### Key Points (continued)

- Conclusions point toward bottom-up social innovation originating in grassroots work that is diffused horizontally by Community Foundations of Canada to its member foundations, as a key antecedent. Enduring collaboration dynamics involving community foundations, prior engagement with data collection and a shared measurement framework, and space for local discussion and adaptation around the framework are identified as key enablers for adoption.
- Finally, early effects of adoption for mapping, reporting, and aligning purposes include reframing current work and promoting new activities and leadership roles, paving the way for new partnerships, and providing a coherent planning framework and strategic focus to grantmaking.

Community Foundation of Northwestern Alberta. Multiple sources of data were combined to strengthen reliability.

Starting in November 2019, we collected information from interviews with practitioners belonging to the three national networks — CFC, Environment Funders Canada, and Philanthropic Foundations Canada — and individual foundations in Canada. To guarantee that the most innovative cases of community foundations' involvement with the SDGs were identified, we used snowball sampling

**TABLE 1** Tools/Frameworks to Help Organizations Work Toward SDGs

	Purpose	Content	Context	Example
Mapping	Help organizations match their current programs, activities, or value chains against SDGs to identify how they are dealing with the goals.	Matching current activities against SDGs	"Business as usual"	<i>SDG Indicator Wizard</i> (SDG Philanthropy Platform, n.d., <a href="https://www.sdgphilanthropy.org/SDG-Indicator-Wizard">https://www.sdgphilanthropy.org/SDG-Indicator-Wizard</a> )
Reporting	Help organizations with performance benchmarking and reporting against SDGs.	Measuring and reporting end-state performance against the SDGs	Sustainability reporting	<i>GRI standards</i> . (Global Reporting Initiative (2022), <a href="https://www.globalreporting.org">https://www.globalreporting.org</a> )
Aligning	Help organizations to use SDGs as strategic opportunities for enhanced social and environmental performance.	Redefining the organization to achieve the SDGs	Strategic management process (ideation, development, implementation)	None found

Source: Grainger-Brown & Malekpour, 2019

with members of the Canadian Philanthropy Partnership Research Network (PhiLab), gathering a mix of academics and practitioners nationwide. Additionally, we systematically reviewed academic literature on the Canadian foundation sector and community foundations, grey literature on philanthropic involvement with the SDGs, online databases, internal documents, and websites.

### The SDG Framework as a Strategic Opportunity

Numerous advantages to integrating the SDGs in philanthropic activities have been argued, supported by limited evidence from success stories published by funder networks (CFC, 2020; Edwards & Ross, 2016; ECFI, 2020; Rockefeller Philanthropy Advisors, 2019). However, integrating the 2030 Agenda into foundations' strategy is not an easy task. The SDG framework adds a layer of intimidating complexity to the inherent intricacy of strategic foundation management. This complexity transcends organizational boundaries and is compounded by interactions among the 17 goals, their global scope, and a massive repertoire of 169 targets, each measured by specific indicators (a total of 231) that are often measured at a country level (U.N., 2021).

Research has identified three types of tools/frameworks to help organizations — mostly businesses — to work toward SDGs, according to their purpose: mapping, reporting, and aligning tools. (See Table 1.) Most of the tools that are currently available are of the mapping and reporting types, which means SDG adoption occurs after organizational strategies have been developed and even implemented. A small number of tools refer to "problem definition" and "goal setting," the early stages of strategic management. However, no tools or frameworks engaging with actual strategy development, the stage that can shape transformative change, were found (Grainger-Brown & Malekpour, 2019).

With this landscape of SDG adoption just emerging in the background, the unique positioning of community foundations to champion the 2030 Agenda has been argued on similar grounds in both sides of the Atlantic. In Europe, the EFCI (2020) states:

Being concerned with defined geographical areas, and having long-term institutional presence, [they] are well placed to understand and address a complex array of interdependent issues at local level. ... They therefore provide an important connection between local actions and global aspirations. (p. 10)



In Canada, CFC (2020) argues, “community foundations are a good fit as SDG champions and implementers because [they] are holders of community knowledge ..., well connected to diverse stakeholders and partners, ... community leaders, and conveners” (p. 19).

Although the idea that community foundations are natural champions of SDG alignment is yet to be systematically demonstrated, evidence shows they already are among the early adopters of the 2030 Agenda in the philanthropic sector. In Europe, almost 60% of community foundations recognize a connection between their work and the SDGs (ECFI, 2020). In North America, collective action led by CFC has turned Canadian community foundations into champions of SDG adoption; it has engaged with the federal government for the development of its own Agenda implementation strategy and 34% of CFC members are already tracking their contribution to community well-being in connection with the SDGs (CFC, 2020).

### Community Foundations in Canada as a Case Study of SDG Adoption

Collective action by community foundations around the SDGs seems a rare dynamic in the broader context of Canadian foundations, where collaboration — though increasing in recent years — remains an exception to the rule. On the positive side, 14 philanthropic affinity groups were created between 2008 and 2016, made up of funders focused on a specific issue (Glass & Pole, 2017). A handful of foundations “are fostering innovation, social and policy change, and are embarking on meaningful partnerships and acts of reconciliation with Indigenous Peoples in Canada” (Elson et al., 2018, p. 1777). Nonetheless, those more prone to collaborating (i.e., staffed foundations that may have a strategy or set of goals) are very few (Glass & Pole, 2017). The COVID-19 pandemic had ambiguous effects: While cross-sector collaborations changed very little, foundations reported increased intrasector partnerships for purposes of information and knowledge sharing, aligning

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or pooling grants and thought leadership provision for recovery (Phillips et al., 2020).<sup>1</sup>

Not surprisingly, the size of the three national networks is small relative to the overall size of the sector, composed of around 10,000 foundations. Environment Funders Canada, created in 2001, gathers 64 funders, mostly foundations, that focus on environmental issues. Philanthropic Foundations Canada, created in 1999, has 143 members, mainly family and corporate grantmaking foundations. These two networks overlap to some extent.

By contrast, community foundations pioneered formalization of intrasector collective action in the country (CFC was founded in 1992). Their association is not only the largest network, but also the most comprehensive, including virtually all 191 community foundations in Canada, and cohesive (i.e., community-only). Members of CFC hold combined assets of over CD \$6.2 billion, and include some of the oldest (the Winnipeg Foundation, started in 1921) and one of the largest (the Vancouver Foundation) in the country (Phillips et al., 2016).

### Leading Intrasector and Cross-Sector Partnering

Thus, the distinct trait of community foundations’ background against the 2030 Agenda is a

<sup>1</sup> Throughout this article, “intrasector” will be used to refer to collaboration within the foundation sector, while “cross-sector” will refer to collaboration between foundations and other actors (e.g., nonprofit, public, business).

*A second idiosyncratic feature of community foundations relative to other types of foundations in Canada originates from participation in the most extensive community-driven data program in Canada, called Vital Signs.*

long experience of collaboration, illustrated by their self-denomination as a “movement” (CFC, 2020). Community Foundations of Canada has deployed its strategy through a proactive search for partnerships — both intrasector, with an emphasis on larger-scale mobilizations of place-based philanthropy; and cross-sector, engaging public-sector agencies, other foundations, corporations, and nonprofits around a shared vision or outcome for complex national efforts. The settlement of refugees and the support for community-led initiatives connected to inclusion, belonging, and reconciliation with Indigenous peoples are recent examples. This strategy is cross-site: the “CFC played a central role by promoting a shared vision, managing relationships with partners, designing the initiatives, and coordinating implementation at the national level, while the community foundations themselves led and coordinated these efforts at the community level” (Carlton & Lyons, 2020, p. 5).

Not only have community foundations participated in place-based partnerships at a local or regional level, but also have frequently adopted a leading role. On one hand, their funding structure compels them to collaborate, as they must secure and piece together multiple sources of income, sometimes disjointed, to fulfill their mission; on the other hand, they need to educate funders on how to partner, and to jointly manage the risks of local resistance to and disruption of relationships provoked by top-down

initiatives, driven by powerful funders, that may be disconnected from community priorities (Glass & Pole, 2017; Kubisch et al., 2011).

**Using Data to Lead Community Change**

A second idiosyncratic feature of community foundations relative to other types of foundations in Canada originates from participation in the most extensive community-driven data program in Canada, called Vital Signs. A shared framework promoted by CFC to report on community well-being, Vital Signs covers over 70 indicators on housing, transit, environment, safety, arts and culture, gender equality, education, health and wellness, belonging, and leadership. However, its approach differs from other effective efforts by foundations to use data to feed collaborative change (CFC, 2018).

Vital Signs is more a knowledge-based leadership style than a reporting initiative, its learning is cross-site as it links the local and national levels, and it goes beyond data gathering to start what it calls Vital Conversations that may shape change in communities. This creative process of engagement, and the reciprocity it generates, are captured by the idea of a sense of belonging. The goal is ultimately to mobilize community knowledge to understand the factors that promote belonging, and then use that knowledge to work toward more inclusive and engaged models of community in co-creation among diverse stakeholders. Although place still matters, the definition of community is now shaped by shared and fragmented interests, values, and social identities (Phillips et al., 2016).

Vital Signs emerged in the mid-1990s, from the initiative of a group of Toronto community leaders, as a tool to measure how the expanded city was doing in terms of quality of life. In 2001 the Toronto Community Foundation adopted this approach, which was relatively new for Canada’s community foundations. In 2006, CFC took over the program at a national level and participation of members grew steadily. The 2006 pilot gathered six community foundations (of 155 members at the time). Then the program jumped to 18 foundations in 2009, and finally stabilized at 65 foundations (of 191 members)



from 2015 onwards. After 15 years, the program has an established legacy; people know and recognize the community foundation work through Vital Signs, which has been exported to 41 community foundations abroad (CFC, 2021a; Patten & Lyons, 2009).

#### The Clayoquot Biosphere Trust: A Pioneer of SDG Adoption

The first adopter of the SDGs among Canadian community foundations was the Clayoquot Biosphere Trust (CBT). It was created in 2000 in Clayoquot Sound, Vancouver Island, British Columbia, to manage a CD \$12 million endowment allocated by the Canadian government for the region right after its designation as a UNESCO biosphere reserve. Its mission is to assist conservation and sustainable development in the region by providing funding and logistical support (Fifield, 2017).

The CBT is the only community foundation created to manage one of the 18 UNESCO biosphere reserves in Canada (worldwide, there is a network of 699 sites in 120 countries). After decades of conflict over natural resources and aboriginal rights, in the 1990s a group of community leaders discovered the UNESCO biosphere reserve program and started a discussion with local people, Indigenous and non-Indigenous, toward using this model to settle the dispute, achieve sustainable development based on values long endorsed by First Nations in the area, and honor the ecological, cultural, and spiritual importance of the region (Fifield, 2017).

The CBT was the first community foundation to include the SDGs in its Vital Signs report. Its pre-SDGs reporting was anchored mostly on 10 Vital Signs indicators: belonging and leadership; health and wellness; food security; economy; safety; housing; environment; youth; learning; and arts, culture, and recreation (CBT, 2017). In 2016, the Vital Signs report included a page matching CBT initiatives with eight SDGs. In the latest report, referring to 2018, almost every page is related to SDG alignment according to CFC recommendations. Each Vital Signs indicator is matched not only with the relevant SDG,

*The first adopter of the SDGs among Canadian community foundations was the Clayoquot Biosphere Trust. ... At this point, the trust is not only using the U.N. framework for mapping and reporting, but also for aligning as it strives to achieve the SDGs through its activities and programs at a grassroots level. ... [T]he London Community Foundation and the Community Foundation of Northwestern Alberta were also identified as innovative adopters of SDGs and, despite their many differences, show substantial similarities from a 2030 Agenda adoption perspective.*

but also with a selection of Agenda 2030 targets. (See Table 2.) According to Rebecca Hurwitz, the CBT's executive director, "this report is one way that we can track progress on the global goals by bringing together research and community action to share a snapshot of our region" (CBT, 2019, p. 1).

At this point, the trust is not only using the U.N. framework for mapping and reporting, but also for aligning as it strives to achieve the SDGs through its activities and programs at a grassroots level. As part of its governance strategies, the SDGs, targets, and their metrics are included in the CBT's 2020 strategic business plan and

**TABLE 2** Matching Vital Signs Indicators and Targets With 2030 Agenda SDGs and Targets

Clayoquot Biosphere Trust*			London Community Foundation			Community Foundation of Northwestern Alberta		
Vital Signs Indicators	SDG	2030 Agenda Targets	Vital Signs Indicators	Vital Signs Targets	SDG	Vital Signs Indicators	Vital Signs Targets	SDG
Health and Wellness	3	3.5	Be Healthy	Obesity rate, children's mental health support, alcohol consumption	3	Health and Wellness	Birth rate, medical doctor access, sexually transmitted infections, home care services, suicides' evolution, accidental fentanyl poisoning deaths	1 3 5 10 11
Housing	11	11.1	Be Sheltered	Rental vacancy, % Indigenous households, % income allocated to housing	11	Housing	Household types, household sales, hotel occupancy rates, shelter demand, senior families house debt, rural homeless	1 3 4 10 11
Income Inequality	1 2 10	1.2 2.1 10.2	Be Equal	Londoners living in poverty, % children and Indigenous in poverty	1 2 5 10	Standard of Living	Food security in Alberta, low-income population evolution	1 2 3 4 5 8 10 11 16
People and Work	8	8.9	Be Employed	Gender income gap, London labor market, growing employment sectors	8	Work and Economy	Food sector in Alberta, charitable sector economic impact, unemployment rate, % Indigenous business	1 3 4 5 8
Climate Change Impacts	13 14	13.1 14.2	NA	NA	NA	NA	NA	NA
Environment	6 14 15	6.3 14.2 15.1	Be Green	Voluntary composting, London's forests, quality of water	6 7 12 13 14 15	Environment	Emission reduction, energy efficiency, litter disposed in parks	3 9 12 13 15
Learning	4	4.1 4.2 4.7	Be Educated	Gender gap, % students Indigenous, % students studying trades	4	Learning	Enrollment art gallery learning programs, school mental health support, library visits	1 3 5 8
Belonging and Leadership	5	5.5	Belonging	Key concepts on belonging	16 + all cited goals	Belonging and Leadership	Voters last elections, % volunteers, giving evolution, % people community belonging	1 3 8 10 11 16

**TABLE 2** Matching Vital Signs Indicators and Targets With 2030 Agenda SDGs and Targets (continued)

Clayoquot Biosphere Trust*			London Community Foundation			Community Foundation of Northwestern Alberta		
Vital Signs Indicators	SDG	2030 Agenda Targets	Vital Signs Indicators	Vital Signs Targets	SDG	Vital Signs Indicators	Vital Signs Targets	SDG
Transportation and Safety	11 16	11.2 16.1	NA	NA	NA	Getting Around	Access to transportation, regional tourism	1 3 5 8 12 13
Safety	NA	NA	NA	NA	NA	Safety	Emergency wildfire support, fireworks going green, domestic violence, crime rates, cannabis use	1 3 5 10 11 15 16
Arts & Culture	NA	NA	NA	NA	NA	Arts, Culture, and Recreation	Exhibition's attendance, childhood sports practice, developmental disability people sports practice	3 5 10 11

\*The CBT has a Youth Vital Signs specific to residents age 13–18 that is not linked to the SDGs across the following Vital Signs indicators: Arts, Culture, and Recreation; Environment; Health; Access and Transportation; Belonging and Leadership.

Sources: CBT (2019); LCF (2019); CFNA (2020)

used in combination with other frameworks endorsed by the networks the CBT belongs to, such as Vital Signs.

Whereas the SDGs provide “a coherent planning framework for organizations and local governments throughout the region ..., publication of Vital Signs every two years provides a regular means of tracking a variety of metrics related to development within the biosphere region” (CBT, 2021, p. 126). Furthermore, the trust has adopted an SDG lens for prioritizing project funding, particularly the ones associated with biophysical attributes of ecosystem health: SDGs 6 (Clean Water and Sanitation), 13 (Climate Action), 14 (Life Below Water), and 15 (Life on Land). The CBT is asking local research organizations to address the changes they have observed on their measures for SDGs indicators in the biosphere zonation they focus on: “Looking at

sustainability issues through the lens of local researchers allows us to focus more closely on local sustainability priorities” (CBT, 2021, p. 86).

### CFC's Approach to Diffusing SDG Adoption

In 2016, CFC knew about the trust's report. According to one interviewee, “[it was,] I think, the first time CFC kind of heard of it, and then we saw it show up in Vital Signs in 2016 from a member without any prompting from us; we were really surprised.” Shortly after, CFC started promoting adoption of the 2030 Agenda among its members through the same dialogic approach it took for itself. According to another respondent,

When we first heard about the SDGs, we thought, “OK, so fancy U.N. global agenda — how is it relevant to us? And is it relevant to us?” ... We found

## *CFC encouraged its members to question the relevance of using the SDGs and customize the framework to make it more relevant for each community.*

that the SDGs are a valuable tool for us because they help primarily to break down silos. And what that means is they present an opportunity for a shared common framework or a shared language around similar goals.

Instead of adopting available SDG-specific tools or developing a new one, CFC encouraged its members to align their Vital Signs with Agenda 2030 goals and targets through a four-step process:

1. accessing, getting to know the SDGs;
2. questioning the relevance of using the SDGs, both internally and externally;
3. understanding the sources to have a good data collection considering the SDG framework; and
4. promoting public education on SDGs (CFC, 2021b).

In parallel, CFC started advocating for the reduced costs and potential benefits of this soft adoption strategy. As described by a network representative,

What we realized is that the goals outlined by the Agenda are goals that community foundations are already working on. So, through their Vital Signs, through their granting, through their partnerships, these are all priorities that community foundations already have in place .... It was really just reframing the work that they're already doing. And in doing so, community foundations then have the opportunity to communicate their work in a way that makes sense to other people who might not be as engaged [with] the community foundation kind of world. And so, it's a helpful

tool for community foundations to develop partnerships ... [with] others who are also already thinking about the SDG agenda — corporate partners, for example; donors.

During the following years, CFC shared stories and launched SDG-specific collaborations and learning opportunities to engage membership around understanding the importance of connecting their Vital Signs with the SDGs and demonstrating it to bring awareness and inspiration to their communities. These included the SDG Learning Community, a six-part webinar series in 2017–2018 (CFC, 2021b); release of its guidebook and tool kit (CFC, 2020); and opening of an SDG hub in Ottawa, Ontario, a new center to promote the goals in Canada.

The CFC approach advocated for the importance of customizing the SDG framework to make it more relevant for each community. Its latest 2021 training, for example, begins with a demonstration of how to create themes for a site and how to use the SDGs as a thematic option. Users will then learn how to edit the indicators provided through Vital Signs, including choosing unique visualizations and styles, and developing a descriptions tab that will allow them to place the data in the context of their community ..., [and] how to create new indicators and how to update existing indicators for future work. (CFC, 2021b, para. 3)

With this flexible approach, SDG adoption may start from almost any of the many facets of the work of community foundations: from communications to granting; from investing to convening.

Furthermore, the effort to integrate Vital Signs with the SDGs opened a window of opportunity for new partnerships between CFC and the federal government. Together with the Institute for Sustainable Community Development, they collaborated to disaggregate national data from the 2016 Census and other federal surveys into community level and feed back local data on the SDGs. According to CFC, in 2018, many indicators were directly matched with SDGs, with foundations frequently administering their own

public opinion surveys locally to supplement national data (CFC, 2018).

### London Community Foundation and Community Foundation of Northwestern Alberta

Through snowball sampling, the London Community Foundation (LCF) and the Community Foundation of Northwestern Alberta (CFNA) were also identified as innovative adopters of SDGs and, despite their many differences, show substantial similarities from a 2030 Agenda adoption perspective. Both foundations belong to diverse communities with a traditional Indigenous imprint. The LCF, registered in 1979, works in the Southwest of Ontario, originally a First Nations territory (CFC, 2020). The CFNA, registered in 1996, works in the county of Grande Prairie and the municipal district of Greenview, the homeland of various First Nations and Métis peoples (CFNA, 2020).

Both perceive their role as a balance of grantmaker and convener. Their work is grounded in strong partnerships that start with grantees — which are the first to signal the sustainability problems to be tackled. According to a representative of the LCF, “our [grantee] organizations on the ground have recognized, they have been reactive, and they’re looking for long term solutions.” In the words of a representative of the CFNA, grantees “have identified that the demands for hot meals, our community kitchens, our food banks, have increased. ... So, recognizing all of the areas in the community that food security is becoming a presence and a topic and a priority.”

Another pertinent commonality lies in their engagement with measurement through Vital Signs: the LCF started in 2008; the CFNA, in 2011. They have used Vital Signs not only for reporting purposes, but also as a tool to identify and frame the most relevant problems in the community, explain them to stakeholders, and raise their profile for “changing the mindset in the community of what to donate and how to

donate.” One foundation sees its main expected contribution as a combination of “leadership, convening, and the data measuring through the Vital Signs,” and perceives data collection as a shared responsibility: “It would be our staff ... [and] the organizations on the ground, the grassroots organizations. Dual line of data collection. And also national data, because we work close to CFC.” The other highlights that, although the grantee initially committed to measure outputs, “we will be asking for outcomes, because that is the end of our funding ... in alignment with [the] Vital Signs approach that tries to measure outcomes rather than outputs, and community impacts: social, environmental, economic, and governance.”

Both foundations engaged with the SDGs after acknowledging that the global roots and impacts of local problems are forcing them to redefine the boundaries of their respective communities. “We’re really part of the global community,” observes LCF CEO Martha Powell (CFC, 2020, p. 39). According to the CFNA’s 2019 Vital Signs report, the alignment of Vital Signs with the SDGs “can be a tool for making the link between the local and the global. While the SDGs are ambitious goals, it is when we work together — one step at a time — with those beyond our local borders that we can create a sustainable future that includes us all” (CFNA, 2020, p. 2).

For the purposes of SDG adoption, both foundations use the framework for mapping and reporting. In their latest Vital Signs reports, the LCF and CFNA map their Vital Signs indicators and targets against the SDGs but, unlike the CBT, do so without using 2030 Agenda targets to track progress toward the goals (LCF, 2019, 2021; CFNA, 2020).<sup>2</sup> (See Table 2.)

However, some changes in the work of both foundations are already worthy of note, suggesting incipient use of the SDGs for alignment purposes. In 2018, the LCF used the SDGs to map London’s priority areas in its Vital Signs report, releasing it just before the municipal

<sup>2</sup> Vital Signs reporting is done biannually. The LCF reported data for 2008, 2010, 2012, 2014, 2016, 2018, and 2020; the CFNA’s data was for 2011, 2013, 2015, 2017, and 2019.

**TABLE 3**

Antecedents, Enablers, and Early Effects of SDG Framework Adoption by Canada's Community Foundations

Antecedents	Enablers	Effects
<ul style="list-style-type: none"> <li>• <b>Bottom-up social innovation originating in grassroots:</b> community leaders promoting the creation of UNESCO biosphere reserve in Clayoquot Sound (CBT as the earliest SDG adopter) or measuring quality of life in Toronto in the 1990s (later to become Vital Signs)</li> <li>• <b>Horizontal diffusion:</b> social innovation adopted and diffused to and among members by the effective collective action of the umbrella organization (CFC)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Enduring collaboration dynamics</b> between community foundations (intrasector) and with other actors, particularly grassroots partners and grantees (cross-sector)</li> <li>• <b>Prior engagement with data collection</b> and a shared measurement framework (Vital Signs)</li> <li>• <b>Space for local debate</b> and local adaptation around the SDG framework</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Mapping:</b> Identifying connections between local activities and long-range, global sustainability challenges through a shared language helps reframe the work community foundations are already doing (e.g., LCF rebranding the Social Impact Fund), and opens the opportunity for new activities and leadership roles (e.g., CFNA and food security).</li> <li>• <b>Reporting:</b> Measuring and communicating the (intended) contribution to SDGs paves the way for new partnerships (e.g., CFC and the government on data collection; LCF and higher education institutions around social impact investing).</li> <li>• <b>Aligning:</b> SDGs provide a coherent planning framework at a community level and a strategic focus to project funding (e.g., CBT integrating 2030 Agenda goals and targets in its governance and strategic business plan).</li> </ul>

election for the sake of advocacy and civic engagement. According to Vanessa Dolishny, LCF's communications manager, this mapping not only provides "leadership to people in our community and allows citizens to use it as a tool for debate," but also inspired more SDG framework adoption initiatives in the city: "We had people calling us after we released Vital Signs, from Western University to small community churches, saying, 'how can we get on board with this?'" (CFC, 2019, paras. 6–7).

In 2019, after engaging in discussion with local stakeholders on key Vital Signs issues through the lens of the SDGs, the LCF identified impact investing as an innovative way of applying the SDG framework. Its existing Social Loan Fund, which combined financial and social returns, was transformed into a more comprehensive Social Impact Fund that provides social purpose organizations a wide range of financial instruments (e.g., lines of credit, letters of guarantee, mortgages, loans). Furthermore, the LCF partnered with the Ivey Business School at Western University to develop an SDG-based framework to measure the impact of such responsible investment strategies (CFC, 2020).

The CFNA, meanwhile, has refocused its priorities based on community response around Vital Signs–SDG data and taken a leadership role to fight food insecurity (related to SDGs 1, No Poverty; 2, Zero Hunger; 3, Good Health and Well-Being; and 4, Quality Education). This new role suggests a capacity to shape transformative change that strongly echoes SDG 17, Partnerships for the Goals. The interviewee from CFNA said:

We have for over a year been chairing the leading Food Security Committee for our local municipality, where we've brought all the stakeholders to the table. And all the stakeholders come to the table with their knowledge, their expertise, from the health authority to the school divisions, the social networks of our organizations that are operating community kitchens.

## Discussion and Conclusions

The SDG adoption processes of the CFC, Clayoquot Biosphere Trust, London Community Foundation, and Community Foundation of Northwestern Alberta reveal common patterns that shed light on the factors that prompt and enable implementation of the 2030 Agenda at the



community level, and on the first effects of this implementation. (See Table 3.)

First, SDG adoption does not happen in a vacuum; rather, it needs fertile ground to take root and emerge and time to evolve. The 2030 Agenda puts both measurement and collaboration involving all types of societal actors in a central position. When the Agenda was passed, community foundations were better positioned to adopt the SDGs than other types of Canadian philanthropic actors due to their dual track record of engagement with data collection, measurement, and reporting to feed community transformation; and involvement in intra- and cross-sector partnerships at a local, provincial, and national level.

We argue that it is not just their condition as community foundations per se, but rather this trajectory of engagement with partnering and meaningful measurement that turns then into naturals of SDG adoption. In particular, the case of CBT is evidence that SDG adoption entails a feasible, incremental innovation for community foundations that are already engaged with sustainable development at a local level. Being a biosphere reserve and a community foundation seems the perfect fit for strategic alignment with SDGs. Once the relationships among the social, economic, and ecological systems are understood, the interconnectedness between the local, national, and global levels becomes apparent and strategic alignment of SDGs with the foundation's Vital Signs flows naturally. Therefore, a track record of collaborative and data-driven community work on local sustainability issues (implicit or explicit) emerges as a key enabler of alignment with the SDG framework.

Secondly, all social innovations analyzed in this research (Vital Signs, SDG adoption) share another path-dependency: They originate from continued discussions among local community leaders that are then institutionalized by individual foundations in their proximity. Next, the role of the collective action network consists of listening to that grassroots leadership and scaling the innovation from the local community or the single foundation to the sectoral or national level

*SDG adoption does not happen in a vacuum; rather, it needs fertile ground to take root and emerge and time to evolve. The 2030 Agenda puts both measurement and collaboration involving all types of societal actors in a central position. ... [C]ommunity foundations were better positioned to adopt the SDGs than other types of Canadian philanthropic actors due to their dual track record of engagement with data collection, measurement, and reporting to feed community transformation; and involvement in intra- and cross-sector partnerships at a local, provincial, and national level.*

across two vectors: one horizontal, as its members assess and engage with the innovation; and another vertical, as network interests in SDGs are contrasted and tuned in with those of governments. Thus, SDG adoption is ingrained in a bottom-up, long-term process of diffusion and scaling of grassroots, cumulative innovations at the community, provincial, and national levels.

It is worthy of note that, though based on these common antecedents and enablers, the three foundations analyzed here show some divergence in their implementation strategies. Back to

*SDG adoption is ingrained in a bottom-up, long-term process of diffusion and scaling of grassroots, cumulative innovations at the community, provincial, and national levels.*

the mapping–reporting–aligning typology, only the CBT plans, implements, tracks, and reports progress against 2030 Agenda goals and targets. The LCF and CFNA mostly use the SDG framework for mapping and/or reporting purposes, utilizing SDGs as themes with which to match their current Vital Signs indicators. (See Table 2.) While the LCF captures the essence of its Vital Signs indicators and directly connects them to one or a few SDGs, the CFNA stresses the complex relationships of each Vital Signs indicator with multiple SDGs.

Nevertheless, the three foundations under our lens follow CFC recommendations to customize both frameworks in ways consistent with community identities, values, and priorities. Consequently, names for similar Vital Signs indicators vary and the expressions that make more sense locally are used for targets (CFC, 2020, 2021). The CBT emerges as the best practice: While being able to report progress toward the 2030 Agenda goals and targets, it is also capable of safeguarding local priorities. One example of this is including an exclusive target about the Nuuchahnulth language, a milestone in achieving reconciliation with Indigenous peoples that the CBT considers determinant toward the Vital Signs indicator Health and Wellness (CBT, 2019).

We argue that these heterogeneous trajectories may be interpreted as a strength of the adoption strategy, rather than as a sign of weak or less advanced commitment to the 2030 Agenda. The CFC strategy of flexible SDG adoption is a copycat of Vital Signs’ — respectful not only of place-based traits, but also of the distinct sense of belonging of each community. What

really matters is that, thanks to this creative or dialogic approach to SDGs in each community, the process of adoption advances and utility of measurement towards sustainable development increases. In the words of one CFC representative, “indicators now are more aligned to the things that municipal governments are looking at, provincial governments, federal governments in Canada, so between communities, across provinces, and at the national and global level as well.”

As of today, adoption of the SDG framework by Canadian community foundations is an incipient conversation within a relatively small but highly cohesive network. “It’s still early, it’s still kind of new,” said one network representative; “it’s still something that community foundations are kind of grappling with and trying to figure out how it best fits into their work.” Additionally, the CFC strategy of integrating SDG adoption within the ongoing, broader Vital Signs conversation makes it difficult to isolate the specific implications of the 2030 Agenda for continuing change in community foundations.

Nevertheless, this emergent conversation starts to show some promising effects. (See Table 3.) If Vital Signs supported the reframing of the concept of “community” as “a process of engagement and a resulting sense of belonging” (Phillips et al., 2016, p. 68), SDG adoption is paving the way for further reevaluation within and around community foundations. Our case study evidences reframing of current work, expansion of partnerships, redefinition of strategies, and repositioning of community foundations. As described by one respondent, CFC members have been holding more and more Vital Conversations around 2030 Agenda-related questions:

“How are we doing on SDG 1 and what are some ways the community together can tackle this? And how do we respond to the challenge that we’re seeing?” ... Community foundations are bringing that global conversation really making it local. ... They’re also reframing the conversation locally to focus more on sustainability. ... Historically, that’s not been the most popular topic.

This case suggests that the true potential of SDG adoption for community foundations may lie in further feeding this conversation to keep reframing their model from that of typically small, local actors confined by the urgencies and constraints of place and time, to that of conveners and partners capable of radically contributing to large-scale, long-range sustainability challenges, today and into the future. Recognizing the interdependence of global sustainability issues and community concerns goes hand in hand with acknowledging that implementing Agenda 2030 requires the type of collective leadership that integrates global collective action with community-based approaches.

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# Where to Start? A Tool for Thinking about the SDGs and Community Foundation Work

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**Keywords:** *Sustainable Development Goals, community foundations, LEED for Cities and Communities, 2030 Agenda, trust-based philanthropy, grantmaking, donor engagement, Collaboratory*

## Introduction

The United Nations Sustainable Development Goals (SDGs) offer a global blueprint for tackling intersecting social, economic, and environmental challenges. The 17 interconnected goals address global challenges such as poverty, inequality, and the depletion of environmental resources, and each has targets and thresholds to be met by 2030 (United Nations, 2015). Unanimously adopted by the United Nations in 2015, the SDGs offer a universal language for the global journey to sustainable development and a North Star to guide it. The SDGs can be applied to map solutions, track results, and make systemic challenges visible; they set a common agenda and present a holistic approach to confronting humanity's most daunting challenges.

While the SDGs are global, change happens in local communities and within industries. Therefore, both widespread SDG adoption and site-specific adaptations are necessary. Regions and communities face common challenges and opportunities, and there is a dialectical relationship between the local and the global. Industry- and community-specific frameworks with corresponding key performance indicators (KPIs) have been established for local governments, corporations, higher education, and other important stakeholders to align their work with the SDGs, among them Leadership in Energy and Environmental Design (LEED) for Cities and Communities (formerly the STAR Communities Rating System).<sup>1</sup> Yet there is not a widely agreed upon and highly utilized

<sup>1</sup> Among other frameworks with similar objectives are those created by the Global Reporting Initiative, Sustainability Accounting Standards Board, and the Association for Advancement of Sustainability in Higher Education.

## Key Points

- The merits of advancing the United Nations Sustainable Development Goals are widely agreed upon by the global community, but designing and applying strategies to do so at the local level can be challenging. This article aims to support community foundations in moving the 2030 Agenda for Sustainable Development forward in practical ways by exploring the use of a point-of-entry wheel to create a shared language that can help community foundations align their local efforts with the global goals.
- Since 2012, Collaboratory has been exploring the potential for integrating sustainability — encompassing economic, social, and environmental pillars — as a strategic framework to advance its mission in a five-county region in Southwest Florida. The article examines how the foundation developed the wheel and applied it to its philanthropic work, presenting examples of success and failure and discussing where the tool has been most helpful and has added undue burdens. It also suggests modifications to the tool for other community foundations seeking to use the Sustainable Development Goals to prioritize, administer, and assess their own work.
- Collaboratory found that the process of SDG alignment made its local philanthropic work more coherent, relevant, and adaptable over time. The SDGs can help community foundations leverage assets and showcase impact, demonstrating efficacy to current and future stakeholders. The foundation also identified areas where further peer-learning between practitioners in the field is needed to refine approaches and processes and to build philanthropic capacity around the global goals.



*Community foundations need to show current and future stakeholders, such as board members, donors, nonprofits, and community partners, that they are effective institutions, and the SDGs can help them leverage assets and showcase impact.*

framework for community foundations to apply the SDGs to their work.

This is problematic because these foundations can be pivotal in advancing the SDGs. They serve as important leaders and funders of efforts to improve the quality of life in communities around the world. Their broad missions, service to targeted geographic areas, and connection with other foundations make them key infrastructure for advancing sustainable development. They steward and safeguard financial resources, networks, and partnerships, and can play a critical role in convening stakeholders while building trust throughout a community. But the degree to which they can successfully coordinate community assets to overcome challenges and seize unrealized opportunities depends on a variety of factors. Doing so at the speed and scale needed for making a deep and broad impact remains elusive for most community foundations.

Collaboratory, founded in 1976 as the Southwest Florida Community Foundation, cultivates regional change for the common good through collective leadership, social innovation, and philanthropy to address community needs in Florida's Lee, Collier, Charlotte, Hendry, and Glades counties. Since 2012, Collaboratory has been exploring the potential for integrating

sustainability — encompassing economic, social, and environmental pillars — as a strategic framework to advance the organization's mission.

Our journey began in 2012 by partnering with the largest local government in our region in developing and implementing a sustainability plan. When that government stepped away from leading those efforts, Collaboratory hired a sustainability professional to guide regional sustainable-development endeavors. This community leadership and public engagement initiative relied on the LEED for Cities and Communities framework to assess needs, prioritize goals, and track progress. When the SDGs were adopted in 2015, Collaboratory worked with partners at the national level to understand how the local indicator data that the community had already been tracking aligned with the SDGs. Mapping these indicators helped the community begin to place its work within a greater global context.

At Collaboratory, our hypothesis is that the SDGs can provide a technical blueprint that is robust and customizable so that community foundations can more effectively propel their mission and improve their impact. Since the foundations' missions do not typically specify a particular issue or cause, the SDGs can improve their understanding of the interplay, trade-offs, and synergies between issues and causes. Additionally, the goals can be aligned with existing local performance indicators, support the development of relevant metrics, or be tied to common frameworks like LEED, the Social Progress Imperative,<sup>2</sup> the U.S. Department of Health and Human Services' Social Determinants of Health, and the Community Foundations of Canada's Vital Signs data program.

The SDGs' ability to make Collaboratory's work more coherent, relevant, and adaptable over time became quickly apparent. Community foundations need to show current and future stakeholders, such as board members, donors, nonprofits, and community partners, that they

<sup>2</sup> See <https://www.socialprogress.org>



are effective institutions, and the SDGs can help them leverage assets and showcase impact. Simultaneously, a community foundation can find it daunting to apply global goals to a specific region or local industry. We found that developing a local lexicon is required to do this successfully.

To utilize the SDGs in practical ways, Collaboratory developed a highly customizable tool — a point-of-entry wheel to guide community foundations in aligning with the goals — that can be integrated with the metrics, frameworks, and technological systems that these foundations are already using. Since no two community foundations are alike, each spoke of the wheel serves as a potential point of entry to get started or a next step to pursue as opportunity and resources allow. This article illustrates Collaboratory's experience with the SDG wheel, elaborating on successes, failures, and lessons learned. It offers suggestions for how community foundations can apply the wheel to their work and identifies barriers and opportunities. Finally, it suggests the next steps and modifications to spur widespread action by community foundations toward achieving SDGs targets.

## Getting Started

Most communities are not highly coordinated to work collectively on achieving audacious goals on a set timeline (Pallotta, 2020). Community foundations can help with that by synchronizing work among various individuals and community groups. Alignment with the SDGs can enhance these efforts, and developing a shared local lexicon is paramount to developing interim targets and KPIs relevant to the community.

Integrating the SDGs into the work of a community foundation requires an understanding of the indivisible nature of the goals and a shared language that enables the right-sizing of global targets for the community. Take, for example, Target 1.1 of the SDGs: “By 2030, eradicate extreme poverty for all people everywhere, currently measured as people living on less than \$1.25 a day” (United Nations, 2015, p. 17). In U.S. communities, it is safe to say that everyone is living above that target, but that a

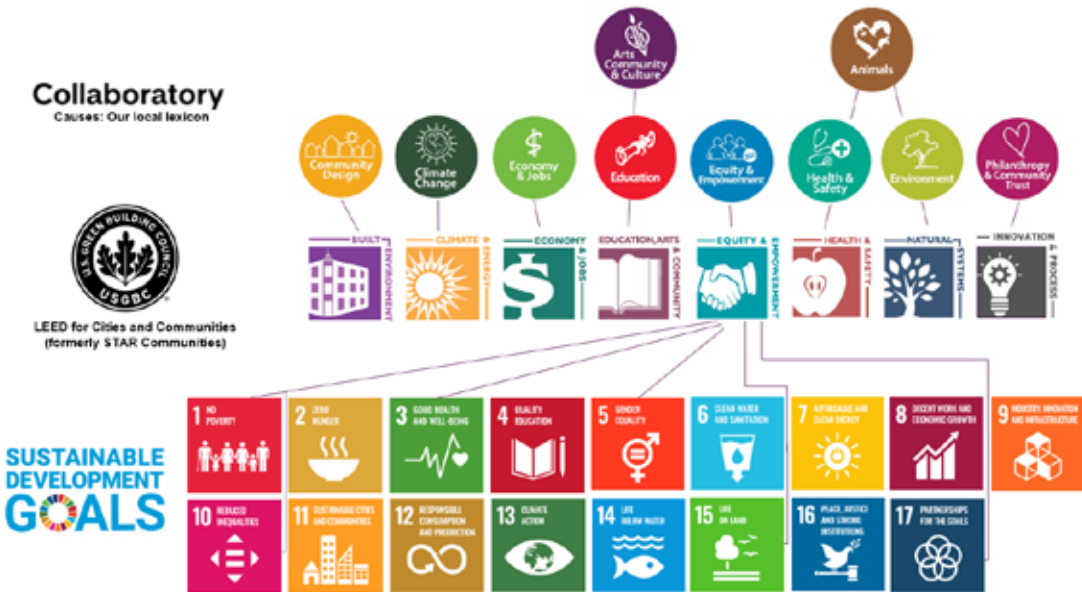
*Integrating the SDGs into the work of a community foundation requires an understanding of the indivisible nature of the goals and a shared language that enables the right-sizing of global targets for the community.*

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significant portion of the population still lives in poverty. Therefore, a community must consider other targets, such as a living wage, attainable housing, affordable transportation, and college completion rates, to set goals for decreasing local poverty. Practitioners must also understand that the SDGs are a holistic framework designed for harnessing synergies and managing trade-offs between intersecting social, economic, and environmental issues (Independent Group of Scientists appointed by the United Nations Secretary-General, 2019). As such, it is not advisable for community foundations to pick them apart and work with only a handful of goals. Such an approach could make sense for certain nonprofits or businesses with a narrow focus, but it is not a good tactic for broadly focused institutions.

Finally, it is important for community foundations to understand how they are situated within the ecosystem of organizations contributing to sustainable development. It is important to regularly scan the community and consider which local governments, institutions, businesses, and community advocates are working to improve environmental, social, and economic outcomes. Are they working in silos, or coordinating their efforts? If there is coordination, who plays the role of lead convener? Are there turf wars between agencies? What shared outcomes and community needs-assessment frameworks or data do they rely on? Are there clear deadlines and interim targets defined to produce a road map for achieving their common goals? Does

**FIGURE 1** Applying LEED Framework to Translate SDGs to Regional Causes



the group reflect the broader community in terms of age, race, ethnicity, gender, ability, and income, and represent a diversity of lived experiences and disciplines? All these questions are worth reflecting upon as a community foundation gets started with the SDGs.

### Collaboratory's Experience in Southwest Florida

Our region's local lexicon and KPIs are based on the indicators from LEED for Cities and Communities, a certification program of the U.S. Green Building Council (USGBC) that assesses key features of sustainable development and quality of life in cities and counties. According to the council's website,

[LEED] encompasses social, economic and environmental performance indicators and strategies with a clear, data-driven means of benchmarking and communicating progress. The program is aligned with the United Nations Sustainable Development Goals and is influenced by [LEED's] engagement with hundreds of cities and communities around the globe. (USGBC, 2021, para. 2)

We adopted these indicators because they were the basis of a sustainability plan adopted by the region's largest county, so key stakeholders were familiar with their core features and metrics. The county conducted a communitywide LEED certification review in 2014 as a component of the plan, and sunset its sustainability program shortly thereafter (Batlle, 2014). Collaboratory developed a memorandum of understanding with the local government to recertify in 2019.

Due to the unique situation in our community, where no local government or entity was willing to facilitate sustainable development for the region, Collaboratory took the leadership role and, collaborating with the USGBC, began adapting the LEED metric and indicators to support a robust menu of relevant local KPIs that were aligned to the SDGs and targets as well as philanthropic Collaboratory Causes. (See Figure 1.)

Each of the eight LEED pillars is underpinned by thresholds and leading indicators that can be assessed using local data. For example, the Built Environment pillar includes thresholds for

**FIGURE 2** Community Foundation Point-of-Entry Wheel to Integrate SDGs

transportation safety and affordability, such as year-over-year pedestrian and motorist fatalities and the percentage of median income spent on transportation needs. We then used the pillars and associated KPIs to create our own lexicon of Collaboratory Causes that would fit the needs of the donors and nonprofits we serve in better understanding impact. Many of our causes, such as Education and Economy & Jobs, were an ideal fit. For others, such as Animals, the LEED KPIs were insufficient and required further customization or development.

To integrate our causes with the 17 SDGs and their supporting targets, Collaboratory applied our local lexicon to specific aspects of our work strategically, as resources and staffing allowed. To do this, we defined our portfolio of work to include collective impact; entrepreneurship; public engagement; business strategy and operations; grantmaking and community impact;

nonprofits and capability building; communications, media, and public relations; board development; donors and funders; and impact investment. These key components of our day-to-day business and overall approach outline the various points of entry where we could apply the SDGs to our work. (See Figure 2.)

Ideally, we would have embarked in this exercise to compartmentalize the various facets of our work at the onset of our work with the SDGs. Doing so would have helped us prioritize and create a planned sequence to integrate the SDGs across our business strategy. Alas, we embarked on this journey before the SDGs were ratified, and the need for a tool to better articulate community foundation work became clear only after years of work and experimentation. We hope readers can learn from our experience and use the wheel to accelerate their adoption of the SDGs.

By illustrating the points of entry for community foundations to work with the SDGs, we aim to provide a potential model for other foundations to experiment with integrating the goals throughout their portfolios. As a part of our learning process, we wrote brief case studies for each spoke of the wheel where we had deeply applied the SDGs to our work. Our journey began along the Community Leadership spoke, and then, as chronicled in this issue's *A Case Study on the Use of the SDGs With a Collective Impact Initiative in Southwest Florida*, we applied the SDGs to the Collective Impact point of entry. Most recently, Collaboratory investigated its application of the SDGs to the Grantmaking & Community Impact and the Donors & Funders spokes.

### Case Study: Grantmaking & Community Impact

#### Field of Interest Fund Grants

Each year, Collaboratory awards grants of between \$700,000 and \$900,000 to nonprofits from field of interest funds. In 2016, we began to consider how we could incorporate the SDGs into our grantmaking processes as well as our nonprofit capacity-building programs, and designed a pitch day for finalists clustered by Collaboratory Causes in alignment with the SDGs. Those awarded grants were given technical assistance and access to a peer-learning community, where they networked with other grantees and attended sessions on strategic communication, fundraising, and how they could tie their work to the SDGs.

Based on program evaluation in 2018, we discovered that, for most grantees, we did not accomplish our learning objective of increasing SDG understanding and integration. So, we worked with graduate students at the University of Michigan School of Information (UMSI) to redesign the curriculum, breaking the cohort of grantees into smaller, thematic groups. We also shifted from one broad, high-level learning session on the SDGs with all grantees to small, segmented groups where we could dive more deeply into local indicators most relevant to their work. Feedback surveys found greater

satisfaction and success with this approach: Grantees reported being pleased with the SDG content, and a few documented how that content enhanced their program evaluation, storytelling, or fundraising skills.

However, we must also acknowledge the inherent power dynamic that exists between the funder and grantee. It is often difficult to evaluate what grantees are getting out of content designed and delivered by funders, because grantees want to make funders happy. To shift this dynamic, we are currently incorporating into our funding strategy the six principles of trust-based philanthropy (Trust-Based Philanthropy Project, 2021):

1. granting multiyear, unrestricted awards;
2. putting the onus on the funder to get to know grantees;
3. streamlining application and reporting processes;
4. employing transparent communication;
5. seeking and listening to feedback; and
6. providing nonmonetary support.

This process will also address the fact that the number of staff hours required for our competitive grantmaking program outweighs the program's impact.

Specifically, the SDGs made it possible for us to focus on principle No. 2 — doing our “homework” — and from there develop a strategy to fund more minority-led nonprofits. Our traditional call for competitive grant applications has not attracted the diversity of organizations we seek to fund, and the failure of many funders to apply a racial equity lens to their funding strategies has drawn national attention. A recent analysis by the Bridgespan Group and Echoing Green found “that on average the revenues of the Black-led organizations are 24 percent smaller than the revenues of their white-led counterparts” (Dorsey et al., 2020, p. 11).

To develop a new approach, we began by mapping the entire nonprofit ecosystem in our five-county region using our local targets and the SDGs. This exercise enabled us to filter by LEED indicators, Collaboratory Causes, the SDGs, and agency demographics when identifying organizations outside our network, and complemented our community leadership efforts in making us more successful at coordinating key stakeholders around particular issues and connecting stakeholders through issues where collaboration is needed. It also supported efforts to engage donors with the SDGs. In other words, this exercise was used to advance our work along multiple spokes of the point-of-entry wheel.

Another key takeaway from integrating the SDGs more fully with our grantmaking is the importance of coordination between development and program teams at community foundations. When field of interest fund (FIF) agreements are overly specific, or when key issue areas lack those funds, it can be challenging for community foundations to invest in areas of greatest need. To advance the SDGs, strong partnerships with professional advisors are necessary, as well as strategies to gain the trust of donors for support in responding to changing community needs. Strategies to reimagine donor pathways via SDG engagement will be explored later in this section.

When experimenting with how the goals could be applied to FIFs, we considered aligning the fund agreements to the SDGs and categorizing everything funded from those FIFs accordingly. This proved to be impossible, since FIFs tend to be broadly written and can often align with a variety of SDGs. We determined it was better to make the alignment of the competitive or invitation grant awards to the SDGs based on the program outcomes or the overall mission of the organization. However, community foundations might consider strategies that create unrestricted FIFs by cause or SDG, leveraging multidonor funding programs to create greater impact.

### Donor Advised Fund Grants

Our grant awards through donor advised funds (DAFs) are three to five times larger in scale on

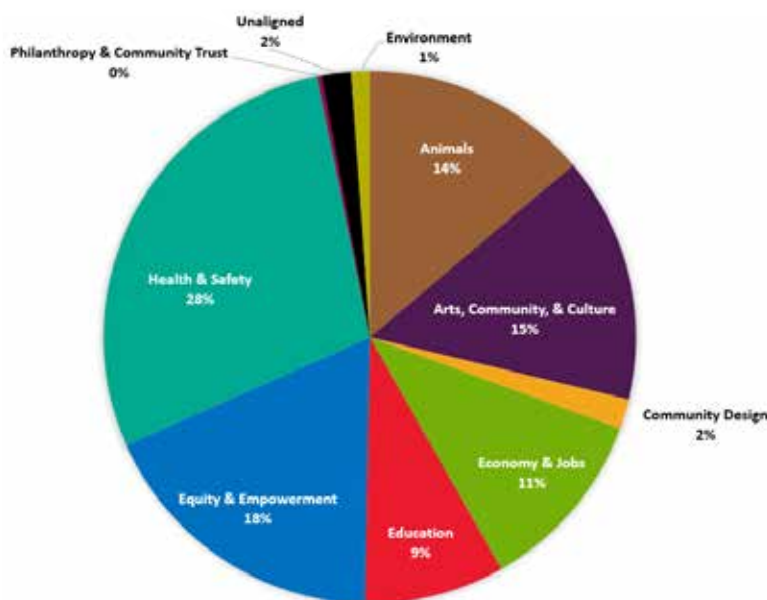
*Specifically, the SDGs made it possible for us to focus on principle No. 2 — doing our “homework” — and from there develop a strategy to fund more minority-led nonprofits.*

an annual basis than those that are supported by FIFs. Therefore, we wanted to take the SDG alignment work we were already doing with our FIF-funded grants and see how we might apply it to DAFs. In April 2020, we worked with UMSI graduate students to analyze over 1,500 DAF awards from the past four years.

We used the LEED indicators as a type of translation device that allowed us to align the SDGs to our Collaboratory Causes. We aligned grants from DAFs to the SDGs using a two-pronged approach. First, funding for overhead, general operations, or capital expenses was aligned based on each grantee’s overall mission and key information available on its website. For example, one nonprofit’s mission — “helping youth develop into responsible and productive citizens and protect public safety” — is accomplished through programs aimed at keeping young people out of the criminal justice system. This most clearly connects to LEED local indicators for reducing school violence and the community crime rate, which are aligned with our Health & Safety cause and SDG 16, Peace, Justice, and Strong Institutions. Next, grants made to specific programs were aligned based on the outcomes of those programs. For example, a DAF grant to the same nonprofit earmarked for their afterschool program to increase graduation rates would be aligned with the local LEED indicator for high school graduation rates, to our Education cause, and to SDG 4, Quality Education.

We typically worked from the bottom up, first identifying the relevant LEED local indicators or Collaboratory Causes that most logically



**FIGURE 3** Donor Advised Fund Giving by Causes in Alignment with SDGs

connected to the mission or program outcomes, and then followed those to the relevant SDGs. However, there were cases where starting with the SDGs made it easier to determine the best cause or local indicator. In other words, an ambidextrous way of working both top-down and bottom-up proved useful. We estimated the magnitude of the impact by SDG or cause based on the dollar amount of the award. In instances where an organization or program was impacting multiple causes or SDGs, we would divide the grant award accordingly. For example, a \$10,000 DAF grant to a program with local outcomes tied to both Quality Education (SDG 4) and Reduced Inequalities (SDG 10) included a \$5,000 allocation to each of those SDGs.

For both general operating and specific programs funds, the SDGs receiving the most money included Good Health and Well-Being (SDG 3), Quality Education (SDG 4), Life on Land (SDG 15), and Partnerships for the Goals (SDG 17). No grant funds were awarded to Affordable and Clean Energy (SDG 7), Responsible Production and Consumption (SDG 12), and Climate Action (SDG 13). Funds for specific programs, but not general operations, were

awarded to Clean Water and Sanitation (SDG 6) and Industry, Innovation, and Infrastructure (SDG 9). The highest quantity of grants went to Zero Hunger (SDG 2), Good Health and Well-Being (SDG 3), Quality Education (SDG 4), and Partnerships for the Goals (SDG 17). Goals relating to climate, clean energy, and other environmental issues received grants less frequently than other SDGs.

We use Collaboratory Causes as our local language to communicate such findings. For example, from fiscal years 2017, 2018, and 2019 and the first three quarters of 2020, approximately \$8.2 million from DAFs was awarded to our causes. No grants were awarded to our Climate Change cause, and places of worship were included in our Arts, Community, & Culture cause. (See Figure 3.)

We derived key insights about our work from this process. First, we were able to identify areas where most awards were going and where there were gaps in funding. For example, in addition to no money being awarded to the Climate Change cause, little was awarded to Environment and Community Design (referred to as the Built



**FIGURE 4** Reimagining the Donor Journey Via the SDGs: An Overview

Compiled by Thais Gonzalez, University of Michigan School of Information.

Environment in many communities), which are closely related issues. We were also able to see where donors' intentions may not have aligned with their impact. For example, a small group of donors interested in investing in climate granted to organizations doing sustainability education, as opposed to those working on outcomes specifically tied to climate change.

Additionally, we were able to see a few places where donor giving was antithetical to our mission. Our "unaligned" category represents grants to nonprofits doing work that undermined the SDGs. Those included anti-LGBTQ organizations, groups intentionally spreading misinformation, mission trips focused on religious or cultural conversion, and campaigns that would decrease women's access to health care. Community foundations need to perform stringent due diligence to avoid mission drift and reputational harm. Relying on compliance screens that are built into software packages used by community foundations ensures only that nonprofits are in good standing with the IRS; they do not catch known hate organizations, for example. Therefore, SDG alignment based on the National Taxonomy of Exempt Entities codes may also prove insufficient for community foundations to achieve their desired impact.

### Ongoing Engagement for Impact: Donors and Funders

The insights gained from analyzing the potential impact of awards from FIFs and DAFs and mapping the nonprofit ecosystem in our region created a foundation for better engaging donors around how they can make their greatest impact. To connect these insights to an engagement strategy, we interviewed donors and did user experience research to redesign engagement vis-a-vis the SDGs. We defined a three-part journey in which prospective and current donors would travel from awareness to engagement with SDG-aligned social impact making. In the awareness phase, donors are introduced to the SDGs indirectly by taking a quiz that allows them to interact with various LEED recertification data. This helps development and program officers learn about donors' interests and desired impact. Next, during onboarding, donors are formally introduced to Collaboratory Causes and learn how to connect with nonprofits that are making a positive impact on the outcomes that matter most to them. Finally, ongoing engagement is sustained through a tailored communication strategy, sending the most relevant content to donors based on findings from quizzes and surveys in the earlier phases of the journey. (See Figure 4.)

We determined that the SDGs are useful for communicating with external communities of practice, but the Collaboratory Causes were more easily understood by existing donors. In other words, the SDGs serve as back-end logic and, in most cases, are not forward-facing. New tools, such as quizzes, can be used to learn more about donors' philanthropic interests and segment them into marketing clusters. These user interactions can be designed for prospective and long-time donors alike. Additionally, we learned that our portal software could be enhanced to improve donor stewardship through the SDGs. Currently, donors can see financial data, such as how their funds are invested, and we are working to build ways for them to see nonfinancial information, such as the causes that will be impacted by their giving.

Our work mapping the nonprofits and aligning grant-award impact with the SDGs also showed us the importance of building a technology stack capable of sustaining this work. For example, we need the ability to tag grants with our local indicators, Collaboratory Causes, and the SDGs as checks are being processed. To successfully connect both sides of our business (raising money and awarding money), this would need to be integrated with a customer-relationship management system capturing donor interactions.

## Conclusion and Next Steps

To effectively transform their communities by concurrently advancing social, economic, and environmental outcomes, community foundations need tools and frameworks beyond the wheel presented in this article. Unlike higher education, corporations, and governments, community foundations do not have a set of metrics and standards specifically tailored to their mission and business practices. Lacking a shared framework diminishes their agility in advancing the SDGs.

By developing a local lexicon and applying the wheel, foundations can accelerate communitywide SDG adoption, especially when done in conjunction with other community foundations. This illustrates the importance of our Sustainable Development Goals Learning

Community for Community Foundations in sharing and growing best practices collectively so that foundations can co-create a customizable framework that enhances their ability to rapidly deliver high-quality programs that produce the size and scale of change necessary to impact outcomes.

Based on the work we have completed to align competitive grant awards and DAF grants to the SDGs with the LEED framework serving as our local translator, we concluded that the framework would need to be simplified, right-sized, and embedded into workflows to be more accessible for community foundations wanting to enhance donor and grantee experiences while increasing community impact via the SDGs. For example, we only used about 30% of LEED outcomes; the others were too specific to the work of local governments and not a great fit for what we were trying to accomplish. On the other hand, many outcomes that we relied on heavily were not closely matched with our work, such as Collaboratory grants to a number of organizations serving immigrants and people with disabilities. There are no LEED Key Performance Indicators that match closely with the desired outcomes for these organizations. Additionally, we grant to many organizations serving domestic animals, and LEED indicators addressed only biodiversity and habitat space of wild animals; we had to develop our own local indicators and SDG alignment in a handful of instances like this.

Through Collaboratory's SDG learning community, we heard from community foundations around the country using such frameworks as Vital Signs, the Social Determinants of Health, and the Social Progress Imperative to support their work; other frameworks, such as the Hawai'i Green Growth Aloha+ Challenge, have been built from grassroots engagement and community conversations. Further exploration and support for this network would be useful for community foundations. For instance, Leadership in Energy and Environmental Design for Cities and Communities integrates complementary standards from relevant professions and

industries to enhance collaboration between local government and planning professionals. This approach could be replicated within a community foundation-specific framework to enhance community-based collaboration.

### **Acknowledgments**

We accelerated our progress and learning thanks to some key ongoing partnerships. The first critical partnership is between our organization and the University of Michigan School of Information. Student groups complete projects with us as a part of class assignments during the fall and winter terms as well as during the UMSI's summer Global Engagement Information Program. In addition, undergraduates from various Florida institutions served as interns to support a variety of Sustainable Development Goal projects. The students offered fresh perspectives and helped us apply

design thinking and human-centered design to our work.

Another critical partnership was with the Central Florida Foundation (CFF) and other community foundations integrating the SDGs into their work. We collaborated with our peers at the CFF to launch a learning community for community foundations engaging with the SDGs, which enabled us to learn alongside a community of practitioners and external experts to whom we otherwise would not have had access. The group's collective investigation and learning can benefit the field by offering a space to share best practices and test our assumptions.

Finally, our partnership with the Charles Stewart Mott Foundation provided us with the resources to further our work with the SDGs. The findings and conclusions of this article were largely made possible thanks to their support.

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# Localizing the 2030 Agenda With Community Data: Lessons From the Community Foundations of Canada's Vital Signs Program

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**Keywords:** *Community indicators, SDG localization, community foundations, Canada*

## Introduction

Communities around the world are turning to the United Nations 2030 Agenda for Sustainable Development to contribute to a global movement toward sustainability and equity. The 17 Sustainable Development Goals (SDGs) that make up the 2030 Agenda provide a shared global framework to gauge the progress communities are making on complex, intersecting challenges, including poverty alleviation, climate action, and social justice (United Nations, 2015). As much as the SDGs are useful to gauge communities' progress on sustainable development, measuring and tracking progress can be challenging for communities and community-level philanthropic organizations.

In this article, we demonstrate how community foundations across Canada are localizing the 2030 Agenda and measuring and inspiring progress toward the SDGs using community indicators that have both local and global meaning. Community Foundations of Canada's (CFC) Vital Signs® program is the country's most extensive community-driven data program, and a useful tool for funders to galvanize SDG localization at the community level (CFC, 2021). This article shares experiences based on interviews conducted with Canadian community foundations as they embarked on an SDG localization process between 2017 and 2021 through their respective Vital Signs endeavors.

Using a data initiative like Vital Signs helped community foundations localize the SDGs in

## Key Points

- Drawing on case studies in Canada, this article analyzes the critical role that community indicators can play in philanthropy's ability to localize the United Nations 2030 Agenda for Sustainable Development and the associated Sustainable Development Goals to address complex societal and environmental challenges.
- Measurement is an integral component of Agenda 2030, and communities are increasingly using indicators to align their plans, inform granting decisions, and track equity and sustainability outcomes. Canada's most extensive community-driven indicator program, Vital Signs, uses different types of data to measure the vitality of a community and support action toward improving collective quality of life; and data gathered through the program is used to support evidence-based, locally relevant philanthropy. This article highlights case studies from three community foundations in Canada that have successfully localized the 2030 Agenda by aligning their Vital Signs data and associated programming with the SDGs to coordinate community action.

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ways that suited their communities, and each experience yielded positive results. Altogether, localizing the SDGs using community data brought significant value to community

*Altogether, localizing the SDGs using community data brought significant value to community foundations, helping to shift their organizational priorities, create new partnerships, tackle inequalities, raise local awareness, increase cross-sector collaboration, and track progress[.]*

#### Key Points (continued)

- This article details the technical challenge of localizing the SDGs through community indicators and demonstrates how the localization process itself can help foundations achieve desired outcomes and drive progress at the community level. Altogether, community indicator initiatives like those used in Vital Signs research are useful tools to help philanthropic organizations accelerate community-level SDG implementation and tackle complex, intersecting challenges related to sustainability, equity, and justice. In turn, a data-driven approach to localizing the SDGs can strengthen the philanthropic sector's ability to target its impact on the issue areas and populations that need it most.

foundations, helping to shift their organizational priorities, create new partnerships, tackle inequalities, raise local awareness, increase cross-sector collaboration, and track progress toward achieving the SDGs. This article shows the critical and meaningful roles that local data can play to achieve a shared, sustainable, and just future using the framework of the 2030 Agenda.

## The 2030 Agenda and the Role of Community-Scale Measurement

The United Nations 2030 Agenda for Sustainable Development was established in 2015 to guide the nations of the world in realizing a set of 17 goals designed to encapsulate equity, justice, and environmental sustainability (United Nations, 2015). The SDGs, successor to the Millennium Development Goals (2000–2015), broadened the scope of an international development agenda that focused on eight goals, primarily targeting low- and middle-income countries, to a multi-scale, comprehensive approach that now spans all countries around the world (Sachs, 2012). The 17 SDGs encompass interlinked priorities on topics as diverse as ending poverty (SDG 1), achieving gender equality (SDG 5), and creating sustainable communities and cities (SDG 11) (United Nations, 2015). The Agenda emphasizes that achieving the SDGs requires all countries to define national priorities around the goals and then measure progress, with data and indicators playing a key role in tracking success.

As implementation of the SDGs gained momentum, it became clear that cities and communities are at the forefront of delivering change (Oosterhof, 2018; Pipa, 2019). In turn, local and regional governments are increasingly using the SDG framework to align municipal plans with equity and sustainability outcomes. Nongovernmental organizations and private-sector businesses are also adopting the 2030 Agenda to highlight their work related to the SDGs. These efforts are known as localizing the SDGs; localization refers to “the process of designing (or adjusting) national and sub-national government development plans, strategies and/ or policies to adapt the SDG targets to the local context and priorities” (Oluoch-Olunya, Butwega, & Onysis Abebe, 2017, p. 6).

The process of localization benefits communities in many ways. Mayors, municipal governments, and other local authorities are embracing SDG localization as a way to leverage the 2030 Agenda's common language for sustainable-development planning that enables cities to define and monitor progress toward local goals while



also sharing lessons on overcoming common challenges with other communities (Pipa, 2019; Organisation for Economic Co-operation and Development, 2020). Localization also provides an opportunity to implement new governance structures, such as SDG-aligned municipal planning initiatives, that are meaningful to citizens in their everyday lives (United Cities and Local Governments, 2020). Oosterhof (2018) notes that localization can help create synergistic actions, bringing together stakeholders from local and regional governments to work with national governments and other actors. Case studies from American cities including Baltimore, Maryland; Houston, Texas; and Santa Cruz, California, show that the SDGs can be very useful for city planning, with clear, communicable goals that can have influence across sectors and impact all citizens (Abraham & Iyer, 2021). The process of localization will necessarily be different across different places, but overall it can help cities and communities diversify their planning efforts to encapsulate social and environmental priorities, as well as those related to economic growth. While the process of localizing the SDGs can provide many benefits, localization also requires cities and communities to embrace a new set of challenges to measure and communicate progress.

Data and indicators are a crucial part of the 2030 Agenda to ensure the world is on track to achieve the SDGs (Sustainable Development Solutions Network, 2014). Each of the 17 SDGs are associated with specific targets and indicators; there are a total of 169 targets and 232 indicators to track progress (CFC, 2020). National governments are primarily tasked with measuring progress toward achieving the SDGs through reports called Voluntary National Reviews. However, as cities and communities take a more prominent role in localizing the SDGs, they must also embrace local reporting as an essential part of demonstrating the progress they are making toward the Agenda.

Reporting progress on the SDGs is no small task, especially at the local level. It necessitates coordination with organizations that might hold data, as well as those that are responsible for

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polymaking on any issue related to well-being and sustainability. In many cases, official data, which include data from national statistical offices, is not disaggregated at a geographic level useful for monitoring local progress; rather, it only paints a picture of national or regional trends. Measuring progress can also be prohibitively expensive. While large cities are better positioned to address measurement challenges by funding data or tracking initiatives, smaller communities are often excluded from such processes due to a lack of available funds. In this article, we offer a solution for communities to monitor progress toward the SDGs in an accessible way: through the use of community-level data in the form of community indicator systems.

### **Using Community Indicators to Track the SDGs**

Community indicators are locally relevant measurements that enable communities to track progress, set targets, and inspire action on objectives that matter to a particular place. Wray, Stevens, and Holden (2017) document how communities began initiating their own local data projects as early as the 1960s, then gradually developed data initiatives into web-based portals, referred to as community indicator systems (CIS). These systems track different priorities

*Community indicator systems are a natural fit for localizing the SDGs, giving communities the opportunity to define what matters across the spectrum of themes of sustainability and form the basis for establishing a measurement system.*

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that suit each community's local context. A CIS makes relevant data available to a wide range of users and can be used to inform local-decision making, and provides a high-quality measurement framework that allows communities to report their progress in a way that is both comparable and verifiable.

Community indicator systems are a natural fit for localizing the SDGs, giving communities the opportunity to define what matters across the spectrum of themes of sustainability and form the basis for establishing a measurement system (Temmer & Jungcurt, 2021). Temmer and Jungcurt suggest leveraging existing community-driven data programs to interpret local data in the context of the SDGs to reduce the costs associated with SDG implementation. Communities around the world embrace CIS as a way to measure the SDGs locally, such as the Aloha+ Challenge in Hawaii (Hawaii Green Growth, 2018), the city of Los Angeles (2021), and the Voluntary Local Review for Shimokawa, Japan (Institute for Global Environmental Strategies, 2018).

In this article, we draw on interviews conducted with staff from Canadian community foundations to show how CIS tied to the work of foundations can be a useful tool to help localize the SDGs. Alongside an online survey, we interviewed three community foundations, in Victoria, British Columbia; Whistler, British Columbia; and Prince Edward County, Ontario. The interviews are documented in this article

to share several lessons on localizing the SDGs using community data through the Vital Signs program. It shares the impacts of SDG localization, which include shifting priorities and granting decisions to directly impact local progress toward the SDGs, and creating new opportunities for equity and sustainability programming in the community.

### **Canada's Vital Signs and SDG Localization**

Vital Signs is spearheaded by CFC and led by a global network of community foundations working locally (CFC, 2021). Originally a project of the Toronto Foundation, the CIS was shared with CFC and the Canadian community foundation network in 2006. As of 2021, over 65 community foundations in Canada have published *Vital Signs* reports and, through the global network of community foundations, reports have been published in at least 10 other countries.

Vital Signs uses data collection and local knowledge to measure well-being linked to common thematic areas, including education, health, housing, employment opportunities, sustainability, crime and safety, equity, and sense of belonging. CFC provides participating foundations with a set of over 80 indicators each year, with disaggregated data (by geographies, age, and sex) whenever possible (CFC, 2021). Community foundations complement national datasets with local research, surveys, and *Vital Conversations* — community consultation events that are designed to foster dialogue and knowledge sharing to help identify the most urgent local priorities. The research process gathers evidence about community conditions and identifies the most prominent barriers to community well-being. Community foundations share their research findings, typically in a report format bolstered by public education activities, to educate the community, inspire civic engagement, provide focus for public debate, and help local organizations and decision-makers take concrete actions and direct resources where they are most needed. The goal of this work is to support evidence-based, locally

relevant solutions to improve the quality of life at the community level.

In 2017, CFC identified that the SDGs aligned well with pre-existing Vital Signs common thematic areas (CFC, 2021). The SDGs were appealing because they offered a global framework and benchmarks for tracking progress, with a deadline to accomplish the ambitious goals. In addition, the SDGs offered a new language for speaking about Vital Signs data, and opportunities to partner with organizations working toward similar goals. The mandate to “leave no one behind” was an especially appealing call to action, as the Vital Signs program had been focused on the concept of belonging for the previous three years. Adopting this mandate encouraged Vital Signs participants to deepen their understanding about who in their community might be “left behind,” and identify how to eliminate systemic barriers to reduce inequities at the community level. In 2017, CFC began offering training to community foundations about how to integrate the SDGs into their local Vital Signs work, and officially aligned the Vital Signs program with the goals in 2018 by aligning its national data collection with the SDGs.

### **Vital Signs Goes Digital to Help Localize the SDGs**

The SDG localization process for Canadian community foundations participating in Vital Signs is currently being accelerated by the adoption of a digital data platform. In 2021, CFC offered a digital platform to community foundations as an opportunity to display Vital Signs data in a new way. The platform, called Tracking-Progress, is a tool developed by the International Institute for Sustainable Development (2021) to make local data accessible and seamlessly integrate with the SDGs. An online CIS template that is based on open-sourced software through WordPress, Tracking-Progress is an affordable, customizable digital tool that communities use to showcase local data, and it can help to can track outcomes that matter locally.

Tracking-Progress can help users localize their data according to the SDGs with a few simple clicks and minimal statistical knowledge. Users

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attend a six-hour training to understand the basic elements of the website, and sites can begin running with a few days of preparation. The community foundations that were the initial adopters of Tracking-Progress began launching their platforms publicly in the fall of 2021. The foundations anticipate the opportunity to host and share real-time, up-to-date, and downloadable data that relate to the most urgent community priorities in alignment with the SDGs.

### **Case Studies From Canadian Community Foundations**

As of 2017, community foundations across Canada are increasingly aligning their community indicator work with the SDGs. More foundations are working to localize the goals each year through Vital Signs initiatives, with an increasing focus on equity and building new relationships and partnerships to ensure that no one is being left behind. This section highlights case studies from three community foundations in Canada that have successfully aligned their Vital Signs community indicator programs to the SDGs to coordinate community action.

We solicited perspectives from community foundations that participate in the Vital Signs program, and aligned their work to the SDGs in two ways. First, we contacted foundations

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through the Vital Signs listserv, seeking volunteers for an online survey. In June 2021, nine community foundations completed the survey, which included questions related to their work integrating the SDGs and the associated impacts. The foundations were given the opportunity to include their own responses and detail obstacles that they faced.

To gather more information, three additional community foundations were interviewed in greater detail to inform the case studies included in this article. Whistler Community Foundation, The County Foundation, and Victoria Foundation were invited to participate due to their demonstrated leadership in the Vital Signs network and efforts to align their Vital Signs work with the SDGs. Each selected foundation represented a different size and level of capacity in order to underscore how community foundations can use a right-sized approach and leverage varied strategies to align their work with the SDGs. Every foundation contacted for an interview agreed to participate, and five individuals participated in the interviews across the three organizations. Interviewees were provided with the questions in advance, so it is possible that, in some cases, additional staff helped to produce speaking notes with content for the interviewees.

The Whistler Community Foundation submitted responses in writing, and CFC and Whistler Community Foundation corresponded virtually through email and written comments in an

online document. The County Foundation and Victoria Foundation were interviewed virtually via Zoom, and CFC transcribed their responses. CFC compiled all notes and responses into a draft of the current summary and format, and provided the draft case study to each foundation for review and editing to confirm accuracy. The case studies were updated with additional context and information and ultimately included in this article. Similar to the online survey, the interview questions allowed the opportunity for community foundations to discuss not only the benefits, but also the challenges associated with localizing the SDGs.

Time constraints limited the scope of this study. The authors were not able to conduct in-depth interviews with all community foundations that are in the process of aligning their Vital Signs with the SDGs, and not all community foundations have time to commit to such a study. Further, the study does not consider the impacts or perceptions of SDG alignment in the wider community, only from staff working at community foundations. A subsequent study on the impacts of SDG localization through local indicators within the broader local community would be a useful next step in this research area.

The results of the case study interviews are presented in the next section, followed by an analysis of the wider impacts of using a CIS for SDG localization. For each case study, we provide some background details on the community and outline the localization process, the results of localization, key lessons learned, and each group's next steps.

### Victoria Foundation

The Victoria Foundation has been collecting data for 16 years on community vitality in the capital region of the province of British Columbia, an area that includes 13 municipalities and three electoral areas, and sits on the territories of approximately 20 First Nations on the southern tip of Vancouver Island. The foundation has published annual *Vital Signs* reports dating back to 2006 (Victoria Foundation, 2021). The information in this section draws from

one interview with staff at the foundation, conducted in 2021.

At the time of their introduction, the SDGs appealed to the Victoria Foundation as a useful framework to guide its work. Staff report that the foundation was an early adopter of the SDGs as they recognized the potential benefits of aligning local Vital Signs research with a similar but broader set of priorities recognized nationally and globally. The SDGs were attractive to the foundation because they presented a specific call to action with measurable targets and a deadline, which would help with setting goals and tracking progress on identified community issues.

Staff report that the Victoria Foundation introduced the SDGs in its 2017 *Vital Signs* report by aligning each Vital Signs theme area to the related goals. The report represented a call to action for more education on the SDGs, for both the community and the foundation (Victoria Foundation, 2017). As a first step, the foundation prioritized educating its staff and board, and then embarked upon a learning journey with the community. Through its community engagement activities, the foundation learned about community priorities, raised awareness of the SDGs, and also brought organizations and individuals on board with implementing the 2030 Agenda locally.

The next step was to localize the SDGs by aligning the targets and indicators with Vital Signs issue areas. The team drew on resources including Statistics Canada's SDG Data Hub (2021) and a Brookings Institute working paper, *Who and What Gets Left Behind: Assessing Canada's Domestic Status on the SDGs* (McArthur & Rasmussen, 2017). The Victoria Foundation's 2018 *Vital Signs* report featured a six-page article on the SDG framework, with a focus on SDG 11: Sustainable Cities and Communities. The report identified the actions needed to drive local progress (as identified through community engagement), and flagged which Vital Signs indicators were aligned to the SDGs (Victoria Foundation, 2018a). In its 2019 and 2020 *Vital Signs* reports, the foundation linked the issue areas with specific SDG targets and included

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more SDG-related indicators that were identified throughout the report (Victoria Foundation, 2019; 2020). The theme of the 2019 *Vital Signs* report, *Vision 2030: Taking Action Today to Build an Even Better Tomorrow*, localized the Agenda 2030 to the region (Victoria Foundation, 2019).

Staff at the Victoria Foundation noted that they realized the important role the charitable sector and community would need to play to help drive progress on the SDGs. They conducted additional research to assemble the *Civil Society Impact* report (Victoria Foundation, 2018b), which identified how the charitable sector could play a vital role in driving progress toward the SDGs. In 2020 and 2021, the foundation followed up with two reports, *No Immunity* (Vantage Point, Vancouver Foundation, City of Vancouver, & Victoria Foundation, 2020) and *Unraveling* (Vantage Point, Vancouver Foundation, & Victoria Foundation, 2021), both of which examined the impacts of COVID-19 on the charitable sector in British Columbia. These reports look at key components of the sector that need to be viable in a post-pandemic environment to help meet the global SDG targets at a community level.

### The Results of SDG Localization

As a result of its decision to integrate the SDGs into its Vital Signs work, the Victoria Foundation further aligned its community consultation and engagements with the SDG framework. Tying the successful Vital Signs work to the SDGs helped the foundation to strengthen relationships with other groups



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working toward the SDGs as well as those working on the ground in the community.

The most fundamental shift at the foundation that has resulted from its alignment with the 2030 Agenda and new approaches to community engagement has been a transition toward trust-based philanthropy, where the foundation listens to community needs and trusts those with lived experience to prioritize grant dollars to where they are needed most. The foundation now works with groups it previously did not have relationships with, funding organizations with exactly what they ask for, and trusting community members to design their own impact. Not only does this empower the grantee organizations, but it also leads to demonstrated positive impacts for the community. A key component of this process is conversations about common goals, including the actions taken in the community to implement the SDGs.

Increased trust and stronger relationships with community groups have led to other positive impacts. In response to COVID-19, the foundation created a Rapid Relief Fund to provide nimbler support to the community and brought together community leaders to provide input each week into where the funding would go and to raise awareness of gaps to ensure that the \$6 million in relief grant money went where it was most needed in the first six weeks of the pandemic. The relationships the Victoria Foundation established through its SDG work enabled this community-led rapid response to provide crucial aid effectively in the early days of the COVID-19 outbreak. This community advisory work also strengthened

existing relationships with community leaders, whose input has been woven into subsequent grantmaking.

The shift to the foundation's way of working and resulting community relationships has also attracted new donors. It has become clear that it is appealing to donors to know their support is directly responding to community needs. Sandra Richardson, chief executive officer of the Victoria Foundation, says this funding model has a ripple effect: "Funding follows us once we take brave steps." There have been increases in younger donors creating funds within the foundation, including through the Gadsden Initiative, which framed a learning agenda around the 17 SDGs and identified four priority goals. Other donors are also keen to see global issues addressed locally. As a result, the foundation's alignment with the SDGs led to an increase of support that directly allows for further, targeted progress on SDGs at the community level.

### Lessons Learned and Next Steps

The key to the Victoria Foundation's success was to recognize at the beginning of the process that the foundation did not hold all the answers and highlighting the importance of being humble, teachable, and able to educate itself. Educating foundation staff and the board were among the first steps, to more deeply understand the SDGs and why they are important on an individual and community level. It was important to also recognize how the SDGs could be integrated into the foundation's existing work by drawing connections between Vital Signs, *Vital Conversations*, and the SDGs.

Community engagement is integral to the Victoria Foundation's success and will be a key component of its ongoing strategy. The foundation plans to continue to engage the community and gain input on priorities for Vital Signs issue areas tied to the SDGs, including through the Vital Community Network, with subject-matter experts from each of the core areas of the report. In 2021, the foundation worked within the SDG framework with a specific focus on inclusion and equity. In addition to a *Vital Signs* report, it



launched a digital Tracking-Progress platform, aligned with the SDGs and targets. It is anticipated that this platform will provide greater public access to community-level SDG data.

### Whistler Community Foundation

The Whistler Community Foundation (WCF) serves the Resort Municipality of Whistler, a small community of 11,600 located in British Columbia. The foundation released its first *Vital Signs* report in 2016, and in 2019 engaged in aligning its Vital Signs work with the SDG for the first time. The SDG localization process led by WCF was initiated following CFC's biennial conference, which offered training on localizing the 2030 Agenda. The WCF focused primarily on community engagement and consultation processes to learn about community needs and how they align with the SDGs. This section draws on the virtual interview process conducted with staff at the foundation in 2021.

Education was a major component of localizing the 2030 Agenda in Whistler. The foundation initiated efforts to educate the community and raise awareness about the SDGs through a series of nine Vital Cafés and a podcast series. Each Vital Café event and subsequent podcast episode was tied directly to an SDG and featured a community expert who would discuss the goal, associated local priorities, and potential solutions. The SDGs selected for programming were related to the foundation's key priorities that had been previously identified as pressing community issues. This localization process ultimately informed the foundation's 2019 *Vital Signs* report (Whistler Community Foundation, 2019).

The 2019 *Vital Signs* report was broken into three thematic areas relevant to the wider community: Mindfulness, Belonging, and Understanding (Whistler Community Foundation). Each area was aligned with relevant SDGs: for example, the Mindfulness theme includes SDG 12, Responsible Consumption and Production; SDG 13, Climate Action; SDG 14, Life Below Water; and SDG 15, Life on Land. The WCF incorporates concepts related to Indigenous Reconciliation, an established societal priority in Canada (Truth and Reconciliation

Commission of Canada, 2015), to activities related to SDG 10, Reduced Inequalities, and other goals. The way that the SDGs were aligned with each theme in the report represented priorities that are relevant to the community.

In addition to its educational and reporting activities, the foundation also updated its grantmaking practices to require each applicant to identify how their request for funding aligns with the SDGs locally. This process helps the foundation prioritize projects that are driving progress toward the goals and ensures grantees are considering the SDG integration in their own work.

### The Results of SDG Localization

The WCF staff reported two significant outcomes of aligning the Vital Signs program with the SDGs: greater community awareness and engagement around the 2030 Agenda, and new opportunities for collaboration between the foundation and community organizations. Through this work, the foundation developed a partnership with the Whistler Public Library, which provided in-kind support to help facilitate the Vital Cafés, and shared SDG-related resources with community members. The foundation also developed a new relationship with the municipal government's Environmental Stewardship department, which supported a Vital Café on the climate conversation with resources and experts for the discussion. This marked the first time the foundation received this type of support for its Vital Café work.

### Lessons Learned and Next Steps

The WCF recognized that in order to play the role of community convener and educator, the first and most important step was for the members of the foundation's Vital Signs committee to educate themselves on the SDGs and how they were applicable within the community context and with Vital Signs. Through this process, the team learned that localizing the SDGs was not as complicated as they had expected.

A key observation through conducting this work was the realization that it was important for the

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foundation to understand not only each SDG, but also the implications within the community and the systemic barriers that are encountered by certain community groups but not others. The foundation learned it must be willing to listen, learn, and work across cultures to better understand community issues and how they vary among groups. Understanding inequities and building relationships is vital to the success of localizing the 2030 Agenda and achieving community engagement and buy-in. The foundation's community engagement practices were crucial to establishing participation in events, partnerships with like-minded organizations, and collective community action to drive progress on the SDGs. The WCF plans to continue to host educational events to spark deep conversations with stakeholders, including businesses, nonprofits, and policymakers, to continue to push for greater progress on the SDGs locally.

### **The County Foundation**

The County Foundation serves the Prince Edward County (PEC) region of southeastern Ontario. The region is an island community, featuring low density with a population of approximately 25,000. The foundation benefits from strong local brand recognition and has been conducting Vital Signs research in the area since 2013 (County Foundation, 2013).

The foundation's team became interested in localizing the SDGs after realizing how well aligned the goals are to their ongoing Vital Signs work. This section draws on the interview conducted with representatives of The County Foundation's staff and board in 2021.

The County Foundation team recognized that the SDGs were appealing as a strong, internationally recognized standard that represented a shared vision, goals, and measurements to track progress and could easily be communicated across organizations and governments. The aspirational goals and associated deadline for achievement could allow the foundation's stakeholders, partners, and donors to see how the work of the local community foundation connects to a broader, global agenda. The foundation found the shared language offered by the SDGs presented an opportunity to raise further awareness of its efforts to drive local progress on the community's social and economic development.

As a first step to localize the SDGs, the foundation's team sought to increase their own knowledge and capacity regarding the 2030 Agenda. They reviewed resources from CFC and the community foundation network, including the Community Foundation of Greater Peterborough's (2021) digital data platform based on Tracking-Progress software that is currently in development and will feature Vital Signs data aligned to the SDGs.

In April 2021, The County Foundation released a COVID-19 Social Impact *Vital Signs* report that featured an introduction to the SDGs and incorporated related goals into each Vital Signs theme area (County Foundation, 2021). The foundation used this report and the associated promotional activities, which included public Zoom sessions, radio interviews, and other media-related activities, to introduce the community to the SDGs and to highlight their local relevance.

### **The Results of SDG Localization**

The County Foundation's team reported that they raised significant awareness in the community of the SDGs as a result of the alignment

to its well-established Vital Signs program. By linking its Vital Signs reporting to the SDGs, the foundation was able to educate important stakeholders and decision-makers, including municipal government, service clubs, nonprofit organizations, and the general public and potential donors about the 2030 Agenda and its local relevance.

An unexpected result of aligning with the SDGs was the foundation's own exploration of the meaning behind the term "sustainability." While some community partners in PEC define sustainability in strictly economic terms, the foundation identified its unique role in the community as an advocate for the importance of driving progress toward social dynamics related to sustainability. The SDGs presented an opportunity to clearly articulate the importance of looking at sustainability more holistically.

### Lessons Learned and Next Steps

Adopting the SDG framework was a gradual process that required patience as The County Foundation educated its own staff, board, and members of the PEC community. It involved a shift in mindset within the foundation team that directed strategic thinking toward the longer-term impact of local actions. As a result of this process, the foundation finds itself now asking questions such as this one posed by Anne VanVlack, Vital Signs coordinator and community engagement at The County Foundation: "How will [our] decisions impact future generations? Will this leave the environment and community better than we found it?"

Aligning the Vital Signs programming with the SDGs also led to a shift in perspective within the foundation about its role in the community. The foundation no longer simply reports on local issues, but instead will now also track progress and work toward ambitious goals for improvement. As a first step, the foundation team indicated that they are creating a Sustainability Index, a tool that will be incorporated into upcoming *Vital Signs* reports that identifies clear goals and tracks progress. A tool like this will

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help to inform grantmaking and conversations with potential donors and partners.

Creating strong linkages between The County Foundation's *Vital Signs* reporting and the SDGs lends credibility to partnerships with other area organizations. Measurement of local data is a key consideration in a new national pilot involving the PEC region along with four other Canadian communities. The concept of the Community Economies Pilot, led by the Shorefast Foundation,<sup>1</sup> is based on integrating three pillars — government, markets, and community — to create local capacity for impact investment funding opportunities to develop social enterprises at the community level. The County Foundation's *Vital Signs* alignment with the SDGs adds considerable value and credibility to its role.

As a next step, The County Foundation is developing a Tracking-Progress digital platform, where it will publicly share *Vital Signs* data

<sup>1</sup> See <https://shorefast.org/our-activities/>

*The branding and simple messaging associated with the SDGs are helpful in communicating the work of a community foundation locally and in identifying opportunities for impact.*

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aligned to the SDGs. This platform intends to act as a repository for data to be used by the municipal government and the community. Through its ongoing Vital Signs activities, the community foundation will continue to raise awareness of the SDGs and drive progress toward their achievement in the community.

### **Opportunities for Impact**

These case studies are just three examples of how community foundations can align their Vital Signs with the SDGs to generate positive impacts at the foundation and within the community. The three foundations interviewed for this article all indicated that as a result of aligning Vital Signs with the SDGs, they are able to identify both community progress toward meeting the ambitious SDGs and clear priorities to drive progress on the most pressing local issues. The foundations reported that they updated their strategic communications, grantmaking activities, partnership development, relationship building, and advocacy in order to drive local progress toward the SDGs.

As discussed in the case studies, educating the community and raising awareness about the SDGs is often the first step for community foundations when localizing the 2030 Agenda. Strategic communications help philanthropic organizations like the foundations included in this article with raising awareness about the goals, while also creating an opportunity to clearly communicate priorities for community progress. The branding and simple messaging associated with the SDGs are helpful in

communicating the work of a community foundation locally and in identifying opportunities for impact.

As community funders, another fundamental step for foundations to take action is to update and align grantmaking activities to ensure funds are supporting organizations that will drive progress on the most pressing priorities. Some community foundations create a new funding stream that responds directly to the SDGs, while other foundations incorporate the SDGs into their existing grant programs through updates to criteria and application forms. This approach encourages community organizations to consider how they can help to drive progress on the most pressing community issues in ways that make sense. Community foundations are then able to better evaluate requests for funding in light of how the applicant organization may assist with driving local progress on the SDGs. Community indicators that track SDG progress can lead to increased funding directed where it matters.

Through a CIS like Vital Signs, community foundations can monitor progress toward the SDGs to see the real impact of its grantmaking. A foundation may choose to reallocate funds internally so that they support more SDG-related projects, and may also apply for funding from external sources, such as the federal government, that are actively trying to encourage community-led progress on the SDGs.

Localizing the SDGs through a community data initiative gives communities a shared language to forge partnerships, both with cross-sectoral partners in the public, private, and nonprofit sectors, and also with other communities facing similar challenges. Organizations that are familiar with Vital Signs and the work of a community foundation often decide to prioritize their own action and resources to respond to the data and identified priorities. Opportunities to connect with new organizations and to shift existing partnerships are other common impacts that result from aligning with the SDGs. Like-minded organizations will work together to drive a community response to improve

community well-being, and foundations have reported receiving new funding as a result of their alignment with the 2030 Agenda.

Opportunities for community foundations to connect with new population groups in the community are another common outcome of SDG localization. The SDG's mandate to "leave no one behind" has encouraged foundations to deepen their examination of inequity in the community. Localizing the 2030 Agenda through Vital Signs has encouraged foundations to push for disaggregated data, conduct community consultations, and build new relationships and/or strengthen existing relationships that will help to identify gaps in community services and opportunities. The community foundation can then better address the needs of equity-deserving groups through partnerships and grantmaking. Community foundations are taking it upon themselves to push for increased awareness of inequity, and are diverting their grantmaking to groups that they are beginning to learn from.

Vital Signs has always been a tool for advocacy, and alignment with the SDGs provides the opportunity for community foundations to continue to push with established SDGs in mind. Having clear priorities linked to a global agenda can encourage community leaders to have informed opinions and arguments when it comes time for municipal government plans to be revealed (i.e., city master plans). It can be a tool for sparking conversations in electoral debates, and can help to ensure future public officials are just as committed to driving progress on the SDGs to ensure their communities are healthy and that no one is left behind.

Localizing the SDGs through a CIS has a range of positive implications for foundations and their communities. Altogether, localizing the SDGs creates a shared language to forge partnerships with partners in the public, private, and nonprofit sectors and with other communities facing similar challenges.

*[L]ocalizing the SDGs creates a shared language to forge partnerships with partners in the public, private, and nonprofit sectors and with other communities facing similar challenges.*

## Conclusions

This article shows that localizing the U.N. Sustainable Development Goals is a context-specific process that can reshape the way community foundations orient and attract funding, build meaningful partnerships, and use evidence to inform decision-making. For the philanthropic organizations included in this article, community indicators played a crucial role in the process, helping to track and communicate progress within and between community foundations. Localization, while dynamic and unique to each place, can also help communities speak to each other as they face shared challenges using the global language of sustainable development. The 2030 Agenda offers a meaningful framework for diverse communities to tackle broad, complex challenges such as sustainable development, poverty alleviation, and racial justice, but requires traceable indicators to demonstrate progress and accountability.

The 2030 Agenda charts a comprehensive and ambitious path for our future. Community foundations and philanthropic organizations more broadly play a crucial leadership role in spurring action within communities, with a range of stakeholders, and between communities. While the challenge of measurement and tracking progress is great, especially for smaller communities, local data can help to spur action that holds global meaning. For foundations that already have data or indicator work embedded in their organizations, this article outlines a strategy to harness the power of local data to improve grantmaking and impact.



For foundations that have yet to embark on measuring the progress of their grantmaking with local data, our hope is to inspire them to allocate resources toward measurement and tracking that makes sense in their own context. Community indicator programs can be a transformative tool for community foundations to bring the aspirational goals outlined in the U.N. 2030 Agenda for Sustainable Development to a local level with global relevance.

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# The Transformative Power of the 2030 U.N. Sustainable Development Goals

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**Keywords:** *Sustainable Development Goals, SDGs, United Nations, community foundation, regional development organization, rural, Minnesota, West Central Initiative, resiliency, sustainability*

## Introduction

West Central Initiative (WCI) is one of six independent community foundations created by the McKnight Foundation in 1986. At the time, Minnesota was facing a historic crisis in the farming and mining sectors. The disruption was so great that it threatened to break the backbone of the rural economy. The primary purpose of the foundations was to empower rural Minnesotans to overcome the economic fallout and subsequent hardships. McKnight supported the six Minnesota Initiative Foundations at their founding, and continues to do so through general operating grants. The support enabled the foundations to establish region-specific programs and projects and build a reputation for reliable and responsive place-rooted grantmaking. (See Figure 1.)

Since WCI's founding 35 years ago, we have funded local and regional projects to help meet basic needs, launched and funded significant work to expand early childhood resources throughout Greater Minnesota, and shepherded more than 200 affiliate funds to strengthen the communities we serve. We are a small but growing organization with 24 staff members working in fund development and philanthropy, early childhood, economic development, transportation planning, communications, and administration.

In addition to our designation as a charitable organization, WCI is one of 10 regional development organizations (RDOs) in Greater Minnesota outside the Twin Cities metropolitan area that the federal Economic Development Administration designates as Economic

## Key Points

- West Central Initiative, a mostly rural community foundation and regional development organization in Minnesota, integrated the United Nations 17 Sustainable Development Goals into its strategic plan in 2019. This article explores how aligning the U.N. goals with the foundation's "nested strategy" of local, regional, and global goals has aligned and energized the disparate functions of the organization.
- This article describes the strategic planning process that led to adoption of the goals, articulates how they have helped evolve the interplay of economic development and philanthropy, and identifies lessons learned from the first two years of working with the goals.
- Focusing on the strong and undeniable connections between the local and the global has crystalized West Central Initiative's higher purpose. The new, transformative vision for the foundation centers diversity, equity, and inclusion as essential building blocks of both successful regional development and place-based philanthropy. Any region — anywhere — with a successful regional economy that also is supported by effective community philanthropy would look like the Sustainable Development Goals, realized.

**FIGURE 1** Map of the Minnesota Initiative Foundations’ Service Areas



Development Districts (EDDs).<sup>1</sup> The 10 RDOs collaborate on a document titled *DevelopMN* that aggregates all the comprehensive economic plans across the regions into one economic development framework. As our region’s RDO, we obtain and administer state and federal grants, provide technical assistance to local units of government, and work in partnership with various local and state agencies to understand and support the economic development of our region. Most of this economic development

work falls under the mantle of “planning,” including helping communities with housing and transportation plans, offering gap financing for businesses that might otherwise fall short with traditional lenders, and supporting local communities to create comprehensive plans. The EDD board oversees activities and reports to and advises the WCI board on matters related to the district. Regionally elected officials, WCI board members, and other EDA-required interest groups compose the advisory board.

<sup>1</sup> The U.S. Department of Commerce houses the Economic Development Administration, which oversees EDDs across the nation. It defines the districts as “multi-jurisdictional entities, commonly composed of multiple counties and in certain cases even cross-state borders. They help lead the locally based, regionally driven economic development planning process that leverages the involvement of the public, private and non-profit sectors to establish a strategic blueprint (i.e., an economic development roadmap) for regional collaboration” (Economic Development Administration, 2019, para. 1).

**FIGURE 2** West Central Initiative's Service Area

The service area of our community foundation is coterminous with our regional development district: nine counties in west central Minnesota and a portion of White Earth Nation. (See Figure 2.) The district's population is approximately 230,000; of the 82 communities within our mostly rural region, the majority have populations of less than 1,000. We have an abundance of uninhabited public and private spaces, with just 27 people per square mile compared to 2,111 people per square mile in Hennepin County, home of Minneapolis, approximately 200 miles southeast of us.

We characterize WCI as a “unicorn” because it is extraordinarily rare for a nonprofit entity to serve as a regional development organization and, vice versa, for an RDO to be a community foundation. The unique composition of our organization has challenged

stakeholders — both internal and external — to fully integrate our regional development and philanthropy functions into a cohesive whole. We used our strategic planning process to better understand the crossroads of philanthropy and planning and, ultimately, to merge the two identities within the framework of the United Nations 17 Sustainable Development Goals (SDGs). Now, two years into our strategic plan and the adoption of the SDGs, we are realizing the benefits of this singular focus, with an aligned and energized staff, an expanding network of partners and allies, and a renewed philanthropic purpose that centralizes community well-being within a global context.

### Building a New Framework

Every newly minted strategic plan aims to sharpen an organization's mission and improve alignment with current conditions while

building a vision for the future. Strategic planning processes, usually structured in three- or five-year cycles, are an opportunity to reflect on the past, assess possibilities, and project future action based on the dynamic interplay of organizational and community readiness.

In 2019, WCI embarked on a strategic planning process for 2020 through 2022. At that time, we were operating in three silos: community development (grantmaking), economic development (lending and planning), and philanthropy, defined in the way that community foundations traditionally operate, as managers of affiliate funds. Preliminary meetings with board and staff resulted in a draft plan that resembled the existing plan, with updates. The steering team was concerned because the draft’s almost exclusive focus was on “what we do well (and have always done well) in our region.”

We took a step back and considered the metachallenges we were trying to address, chief among them the perceived rural–urban divide, the miasma that had formed around discussions of climate change, and the sense that diversity, equity, and inclusion (DEI) were not rural issues. Yes, we were successful working on specific projects: early childhood, transportation planning, affordable housing, and workforce recruitment. But these projects were functioning as discrete, fragmented interventions, as we lacked a clear, cohesive throughline to our purpose.

In addition to a lack of clear shared purpose, we could feel that we were not getting to the root of seemingly intractable problems. We knew we were doing good work. Our stakeholders trusted us; our EDD and WCI boards were confident that we were bringing value to the region and making good on our mission. But our work was focused on the manifestations of much larger systemic imbalances, and we felt an emerging sense that we could — and should — do more. We wanted our strategic plan to foster a holistic view of our work that fully tested our hunch that the value of our combined efforts was greater than the sum of our parts. We were looking for a map of the interdependent network

*Early in our strategic planning process, we arrived at three priorities: invest in local; reimagine regional; and educate, activate, and celebrate.*

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of systems that have the greatest influence on the quality of life in our region.

### **A Rural Foundation Goes Global**

Early in our strategic planning process, we arrived at three priorities: invest in local; reimagine regional; and educate, activate, and celebrate.

The first, invest in local, was an affirmation of our role as a regional community foundation and an RDO. We needed to assert that our primary focus is, was, and always will be local. The second priority, reimagine regional, was a reckoning with the realities of the global economy that we all knew and experienced every day, whether we were selling soybeans to Asia, buying school clothes for our children at Walmart on the edge of town, or wiring funds to relatives in Somalia. We are globally connected by virtue of the internet, our transportation systems, the flows of people into and out of our region, and our buyers and sellers who operate everywhere. The call to educate, activate, and celebrate was a rejection of our previous role as a “neutral convener” and an embrace of our responsibility to act with all that we know from our planning work and hear from our community partners. This priority was a step toward claiming a meaning-making role in our region.

These three priorities expressed what we knew, but had yet to express, about systems change. More than 35 years of experience in our region had taught us that the success of any endeavor relied upon an abiding commitment to the well-being of our region. We also knew that our experiences had positioned us to deliver



## Localizing the Global SDGs Exercise

We placed the 17 SDG icons around our large conference room and put Post-it notepads on the table. The Economic Development District group and our West Central Initiative board members began writing down the work in their community or county or region that related to each of the sustainable development goals. As they began pasting the Post-it notes to the wall, we could see which goals were receiving a lot of attention and which ones still needed work. More importantly, it was clear we were already working on achieving the 17 SDGs because each goal had at least one and often many Post-it notes on it.

studied advice and to use our credibility, longevity, and unique position in the region to create insight, devise strategy, and advocate for new approaches. And, finally, we knew that our region's well-being was anchored in global well-being.

While we were working to identify our strategic priorities, we also were grappling with the integration of our regional development plan. The Comprehensive Economic Development Strategy (CEDS) guides our region's economic development efforts for a five-year period.<sup>2</sup> This document is the repository for a regional dataset, related goals, and attendant plans. We knew that it should play a greater role in defining our programmatic investments, as well as informing the priorities of partners and stakeholders around our region. Better use of the CEDS by bringing this regional plan into dialogue with the aspirations of our philanthropic partners seemed to be a powerful and necessary step toward sparking the "magic" of our unicorn organization — aligning and integrating our planning and philanthropic functions to produce insight and advance the region.

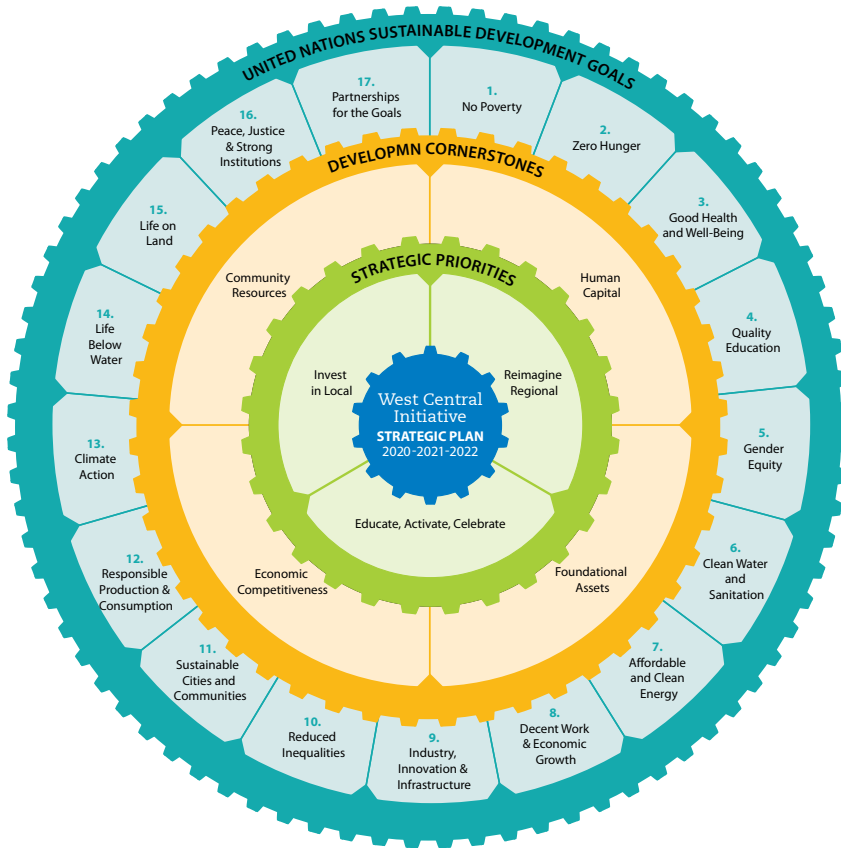
A set of organizational priorities emerged that opened the door to greater influence, a broader global perspective, and a more data-driven approach. But we were struggling with the arrangement of these parts, especially as we realized that the CEDS might pull us into work that was different from that to which we were accustomed. The idea of bringing in an extra organizational set of goals was foreign to how we (and so many of our regional community foundation colleagues) had approached strategic planning in the past. Strategic plans were born of internal processes that represented the organization's unique and timely disposition. Strategic plans were an expression of our strengths, an affirmation and reiteration of the work for which we were known. Adopting a set of goals, such as those represented in the CEDS, that were not uniquely our own seemed to threaten the validity of our planning process and, worse, call into question our tried-and-true programs and interventions. We couldn't just cut and paste from a plan, developed without the input of our staff, that was designed to serve as a road map for cities and counties throughout the entire region, could we?

As we were working through the question of how to integrate the CEDS, we began considering the SDGs. WCI's president, Anna Wasescha, had been following the United Nations' reporting on the SDGs and brought them to the organization's leadership team for consideration as we were pulling together the many strands of our strategic plan. All 193 member states of the United Nations adopted the SDGs in 2015, but they were virtually unknown in west central Minnesota in 2018. The beauty, relevance, and comprehensiveness of the SDGs were undeniable. But we now were considering the incorporation of a globally conceived set of goals, of introducing a framework developed by the United Nations, of moving from a traditional organizational plan focused on economy, community, and philanthropy to a complex web of organizational, regional, and global goals. The

<sup>2</sup> Each Economic Development District develops a CEDS as part of its contract with the Economic Development Administration. These documents may be described differently outside of Minnesota, but the basic requirements are the same across the nation's vast terrain of EDDs.



**FIGURE 3** The West Central Initiative’s Strategic Framework



prospect of introducing a road map for development that claimed to be both “global” and “sustainable” amid the rising populism of 2018 was a risky proposition for our organization — unicorn or not.

As we sat with these lists — three strategic priorities, four regional cornerstones, 17 SDGs — sorting out a hierarchy simply was not working. Should we move from the top down? Which set of goals should be at the top? How could we translate between “levels” of the plan? How could we claim the SDGs as our own? Should we select just a few of the goals — those that best fit with what we already were doing? How could we possibly represent so much content in a way that would be digestible by our staff, our board, our donors, our partners, our region?

And then, the systems lens came into play. We saw these elements as nesting gears, or the lenses of a camera. They became different ways of seeing, of bringing things into focus. Each layer — local, regional, global — helps us understand the others. And, like the gears of a bicycle, they are all parts of a whole, working together as a system to optimize performance, adjusting and maneuvering as needed to tackle changing terrain. We were not choosing a set of regional or global goals over our own, we were nesting our organizational objectives within — and testing them against — regionally and globally focused gears. (See Figure 3.)

When we joined the local, regional, and global gears in a new strategic framework, we shined a bright light on our place within a larger landscape of interdependent systems. Nesting our

**FIGURE 4** The New Strategic Framework: Spreading the Word



Rebecca Petersen, WCI's development director, holds a placemat that illustrates the foundation's new strategic framework.

organizational priorities within the context of our region's economic development goals (the CEDS) helped leverage our joint role as a regional community foundation and an RDO. Nesting both organizational and regional plans within the context of the SDGs helped align our work with that of organizations around the world. And sharing our framework with local donors, communities, and elected officials would open doors we never would have imagined. (See Figure 4.)

### What We've Done

Over the past two years our organization has been a living, breathing experiment in localizing the SDGs in a mostly rural context. Change has come in fits and starts, leaps and bounds. As we reflect on our progress since first conceiving our “nested strategy” in 2018, we realize that the culture of our organization and our identity is evolving into something bigger, broader, and more integrated with the systems at work across our varied region.

### First Steps

Our first step in adopting the SDGs was to engage our boards in localizing them. We

introduced the 17 goals to our WCI board and, upon approval, our EDD board. We engaged our leadership by sharing ideas about relevant partners and efforts. Through a naming and framing exercise, we used the SDGs to understand the good work that already was underway in our region. This demonstrated the utility of the goals while diminishing the skepticism that we might expect when introducing rural leaders to a matrix of 17 globally conceived goals.

We also adopted a “DEI in everything we do” strategy. During the last two years, we have been learning about DEI principles, growing our understanding of DEI in terms of systems change, and beginning to advance our individual and organizational cultural competence. We included equity as a “metagoal” that cuts across all 17 SDGs, and we are beginning to develop related metrics for economic development (e.g., assessing distribution of small business loans in terms of demographic characteristics, setting benchmarks, refining lending eligibility).

We also began to operate from the understanding that cultural diversity and biodiversity are vital measures of sustainability because, as Capra and Jakobsen (2017) explain, conditions

of diversity ensure resilience and resilience is a corollary to sustainability. We are using board and staff vacancies as opportunities to reassess our priorities, choosing quality of process over expediency, and working to redesign job descriptions, board recruitment materials, and other informational assets to attract people who are excited about and committed to sustainable, equitable development.

We have also joined the expanding conversation about how to use the SDGs to localize sustainability efforts and foster systems change. In 2019, 11 members of the WCI staff and board attended the Canadian Community Foundation Conference and pre-conference focused on the SDGs. We also have joined a host of conversations related to the SDGs and sustainability generally, as well as individual goal areas. We are now at the table for conversations that stretch our understanding of sustainable development and offer new opportunities for partnership and collaboration. We have presented at the Minnesota SDGs Roundtable, participated in the Climate Donor Roundtable, shared our work with the other Minnesota Initiative Foundations, partnered with other RDOs and community foundations on SDGs-related projects, and connected with foundations across the country to explore possibilities for linking and leveraging our respective efforts.

### SDGs and Regional Needs

We are working on integrating the SDGs into how we assess our regional needs and, ultimately, how we articulate our economic development strategy. In addition to introducing our EDD board to the British Columbia Council for International Cooperation<sup>3</sup> Movement Map philosophy, we developed a regional dashboard that measures progress across the 17 SDGs. This mapping project was inspired by the Aloha+ Challenge Dashboard,<sup>4</sup> which links to available data sources to produce autogenerated updates to regional measures. We plan to introduce this dashboard as a public resource, while also using it internally as a key driver of organizational

planning and prioritization. We hope that the dashboard will be a highly visible way for stakeholders throughout our region to collaboratively plan, prepare, and pivot.

The SDGs are making their way into our region's economic development plan as well. The latest iteration of our region's CEDS included a broadened and intentionally more diverse community engagement process to identify regional trends and priorities. Our team of community planners focused on the SDGs when rewriting the region's CEDS and kept measurements in line with SDG indicators. Our aim is to use the SDGs to integrate sustainability into all our activities — and to bring our experiences to the table we share with our other regional development organizations across the state.

### Realigning Grantmaking and Evaluating Progress

Over the last two years, on the heels of integrating the SDGs into our strategic plan and in the context of the COVID-19 pandemic, our grantmaking has looked considerably different than in the past.

Since our inception, we had been seen as a reliable source of small grants for nonprofits across our region. In recent years, our grantmaking lacked a clear direction, strategy, or focus — and our grantmaking strategy was due for an overhaul. When the pandemic hit, we responded quickly by shifting internal funding into a new Resiliency Fund. The fund application afforded us the opportunity to introduce the SDGs to our nonprofit applicants and to gently guide them into seeing their work through the lens of the SDGs. The first grant round focused on addressing the immediate COVID-19 needs of our region, including personal protective equipment, cleaning supplies, food, household goods, and more. The second round pivoted to sustainable and equitable recovery and included a participatory grantmaking process with a goal of power equity in our grantmaking decisions.

<sup>3</sup> See <https://map.bccic.ca>

<sup>4</sup> See <https://aloha-challenge.hawaiiagreengrowth.org/dashboard/>

**FIGURE 5** Modeling Sustainability: Native Ecosystems



Native prairie projects, like the one above, surrounding its building, are part of WCI's incremental steps to model sustainability.

As we continue to center equity and sustainability as our organization's core "why," we are considering how grantmaking will look for our organization beyond the needs associated with COVID-19. We anticipate further shifts to align grantmaking with economic development, while also supporting equitable and sustainable efforts within our affiliate funds.<sup>5</sup>

We also are evaluating our progress. We hired a consultant to help us assess our first two years of implementation, and learned that our progress over that time and within the context of COVID-19 has brought uneven internal investment in the SDGs. Some of our staff and board members use the SDGs to understand and advance everything they do in their role. Others — two years in — still struggle to understand

the relevance of this global framework and are stymied by the complexity of the 17 goals and more than 300 targets and indicators.

Essential to bridging this gap and improving our approach across the board is continued assessment and reporting. We plan to use our evaluative processes to further engage stakeholders both inside and outside our organization, fostering transparency and increased engagement in all that we do. We will continue to evaluate our efforts and share our findings internally and externally through papers, presentations, and frequent conversations.

### Internalizing the SDGs

We are doing our best to model sustainability in incremental steps in our own backyard (quite

<sup>5</sup> Affiliate funds are restricted field-of-interest funds designated for specific geographic or interest areas within our region. WCI partners with communities, families, and interest groups to design, develop, and manage these funds.



**FIGURE 6** Modeling Sustainability: Green Transportation



To encourage more sustainable commuting for staff, WCI installed two artist-designed bike racks in front of its headquarters, shown here with Director of Transportation Planning Wayne Hurley, and added a new locker room space with a shower.

literally) with native prairie projects on the site surrounding our building. (See Figure 5.) We also are replacing our heating, ventilation, and conditioning system with a geothermal system and have reduced the use of disposable products in our facility. To encourage employees to consider other modes of transportation to work, particularly biking, we installed a new locker room space with a shower and two artist-designed bike racks at the front of our building. (See Figure 6.)

In the wake of COVID-19 and after almost two years of remote work, we are reconsidering how we work, the need for travel, and the potential to reduce our carbon footprint. We have aligned our investment portfolio with our commitment to sustainability, examining the foundation’s investments in 2019 and using the environmental, social, and governance (ESG) model

to ensure positive returns beyond the financial bottom line.

### What We’ve Learned

West Central Initiative is two years into the three-year strategic plan. Our stated goal for the region is a vibrant, inclusive, and sustainable world. The SDGs, regional development cornerstones, and our own organizational priorities have been our road map for moving into a more integrated way of operating with equitable, sustainable development as our core driver.

When we adopted the 17 SDGs, we also adopted 169 targets and 232 indicators. This complex web of globally imagined directives for a healthier planet was a reach for our rural place-based organization. For the last two years we have focused on digesting the richness of the SDGs framework, experimenting with ways to integrate the goals into our regional and

*For the last two years we have focused on digesting the richness of the SDGs framework, experimenting with ways to integrate the goals into our regional and organizational plans, and testing methods of communicating our still-unfolding approach to sustainable regional development within a global context.*

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organizational plans, and testing methods of communicating our still-unfolding approach to sustainable regional development within a global context.

While we have much to learn and discern, we offer five lessons regarding the utility of the SDGs for community foundations and RDOs, particularly those serving rural populations.

1. *Identify what's already working.* Work in partnership with local units of government, community groups, and internal leadership bodies to identify SDG “wins” or those efforts already in place. This can be a positive entry point to the goals in the earliest phases of adoption, and also lays the groundwork to bring disparate interests together in affirmation of sustainability as a relevant standard for local units of government. Highlighting the positive norms related to sustainability that already are present in a community can help center community well-being and move constituents into alignment. We expect this approach holds the added benefits of building good will, cultivating community pride, and fostering civic engagement.
2. *Use the SDGs to find common ground.* The SDGs offer a meaningful entry into conversations about sustainability — particularly climate change and equity, which can be difficult territory for a place-rooted foundation, especially in rural America. The SDGs are helping us educate people throughout our region on the fundamentals of healthy communities while illuminating shared values that transcend the deep political divide that characterizes present-day small-town life. The SDGs provide a common language and framework to understand what we need to prioritize, to share what we are doing with others within and beyond our region, and to understand measures of well-being across dimensions of difference. And the SDGs, presented in concert with our regional development cornerstones and organizational priorities, allow us to localize seemingly insurmountable global problems, finding ways to leverage our local and regional strengths in service to the problems that most affect west central Minnesota communities.
3. *Gather and leverage data.* Foundations engaging with the SDGs soon will discover the potential — and the challenge — to get serious about data collection. For us, this has meant investing in data infrastructure by refocusing staff positions, hiring more community planners, working with a consultant to evaluate our efforts, and contracting with outside firms to develop a customized regional dashboard. Growing our capacity to work with regional data is changing who we are as an organization and greatly increasing our potential for impact, partnership, and donor education. Organizations considering integration of the SDGs should plan to invest in customized systems that use existing data and find ways to fill gaps where data is of low-quality or nonexistent.
4. *Link organizational strategy to external frameworks to catalyze growth.* Adopting “someone else’s” framework helped stretch our organization beyond what we thought we could — or should — do. Further, the correlation between our organizational and regional



goals affirms the credibility of the SDGs for our region, as well as the credibility of our organizational and regional priorities for the planet. We suggest foundations embrace existing models and frameworks as they envision new territory and prepare for evolutionary leaps. The directions suggested by a well-vetted framework, such as the SDGs, also will foster growth by linking geographies, leveraging resources, and fostering cross-sector collaboration and partnership.

5. *Consider equity as an SDGs metagoal.*

Organizations and communities aiming to make progress on the SDGs should assess the goals through a DEI lens. More specifically, evaluating progress with an aim of equity<sup>6</sup> calls upon communities and organizations to engage deeply with data that compare progress across demographic categories and to devise strategies that address the unequal distribution of resources, influence, and outcomes among populations, sub-geographies, and identities. Working to embed reduced inequalities (SDG 10) into the way a foundation understands its impact is vital to devising truly sustainable futures for the global community.

## How We've Changed

Since adopting the SDGs as part of our strategic framework, we have undergone significant changes as an organization. We have welcomed a new generation of community planners and philanthropy professionals. We have made sweeping reviews of our budget and related processes. Perhaps most significant, we have weathered the storm of COVID-19, testing the strength of our systems to respond to regional crises and maneuver during times of uncertainty, economic stress, and social isolation. Through all of this, the SDGs have afforded our team a stabilizing central focus, as we were pulled into unfamiliar territory, together. When the COVID-19 pandemic hit, we had already begun to expect the unexpected, and had started

*Since adopting the SDGs as part of our strategic framework, we have undergone significant changes as an organization.*

to rearrange our internal ways of being to support shifting priorities by reconfiguring organizational structure.

- *We are now more strategic and intentional, rethinking how and why we are doing things.* We are engaging with our strategy and philosophy like never before. We have learned to use opportunities as they emerge to rethink and recraft our policies and practices to better align with our commitments to sustainability and equity. For example, when the federal government recapitalized our loan fund last year, it was an opportunity to rewrite our loan guidelines, expanding the prospective pool of loan recipients to businesses that would promote sustainable development. As we prepared to redraft our CEDS, which guides our economic development activities, we revamped our approach to be more inclusive and democratic, drawing a much broader contingent of voices and perspectives to shape the final plan. We also reconsidered what economic development is, raising our own awareness about the lens we had used in the past, and widening that lens to include sustainable and equitable development in our goals for the region.
- *We have a sense of urgency in our work.* Adopting the SDGs has mobilized us as an organization to recognize the historic moment in which we exist. We have a newfound sense of urgency in our work and an awareness that the way in which we operate must change in order to meet the challenges

<sup>6</sup> The Annie E. Casey Foundation defines equity as “the state, quality or ideal of being just, impartial and fair.” The concept of equity is synonymous with fairness and justice. It is helpful to think of equity as not simply a desired state of affairs for a lofty value. To be achieved and sustained, equity needs to be thought of as a structural and systemic concept” (2021, para. 6).

of this pivotal decade. The SDGs have made our organization more future-focused and future-relevant. We have attracted new staff who are bringing fresh ideas and enthusiasm; we have new partners and collaborators; and we have new funding opportunities. Our community and economic development planning work is evolving toward a more ecological perspective. Our philanthropy work is evolving to be more inclusive and democratic, as we shift grantmaking into the hands of stakeholders through participatory approaches and work in closer partnership with donor advised funds, equipping donors to make better informed grantmaking decisions. Our Era to Act virtual speaker series brings leaders from around the country into conversation with regional influencers. Our staff, donors, board members, and allies are learning and aligning through “glocal” conversations about sustainability and equity.

- *We are leaving behind the notion that rural has been left behind.* With the SDGs, the promise is to “leave no one behind.” We have known for some time that we have many home-comers and newcomers in our region. Ben Winchester (2012), a research fellow with the University of Minnesota Extension Center for Community Vitality, documented a “brain gain” of 30- to 49-year-olds moving or returning to rural areas in Minnesota to work, buy homes, raise children, and participate in the life of small-town communities. We knew that our rural region was making gains as a result of our increasingly digital and global economies, putting small towns across our region on equal footing with other communities around the globe. And yet, despite evidence of a resurgence of rural strength and innovation, the self-image of rural as “behind” persists. We are working to change that through our Live Wide Open campaign, which highlights the stories of newcomers and homecomers in our region and the ways that they contribute mightily to our quality of life. We also are bringing our rural voice into conversations within state, national, and global networks, representing “rural” as innovative, relevant, and future-focused.
- *We found traction in claiming our role as a regional leader.* The SDGs have challenged our “think small” mindset and helped us claim a point of view, stepping into leadership within and beyond the region we serve. We are dislodging old ways of thinking and moving forward with a clear, new voice within a larger global movement. The SDGs not only recognize the importance of what we do within our service area, but they also reflect the importance of our region in a global context. Both inside and outside our region, we have influence and make a positive difference. Our notion of stakeholders has stretched far beyond our geography to include people, partners, and networks around the globe. By linking organizational and regional development goals to the SDGs, we are expressing the reality that sustainable, systemic change only is possible when working both within and beyond our region.
- *We are starting to realize the true power of our “unicorn” organization.* As Markley, Topolsky, Macke, Green, and Feierabend (2016) assert, the integration of “place-rooted” philanthropy with economic development efforts represents a uniquely powerful alignment. For WCI, our economic development or “planning” work helps us analyze community needs as they relate to economic prosperity and community vitality. This knowledge inspires our philanthropic work, helping us to focus our fundraising and grantmaking to best serve our region for maximum impact. As we continue to advance and refine our “nested strategy,” we will be considering ways to engage our donors more effectively in the burgeoning sustainability and resiliency movement. We also will strengthen the connection between the SDGs and our EDD partners (government agencies and elected officials), prioritizing equitable development and working to restore the harmonious interdependence of the land, water, and people of our region.

## Conclusion

We have just eight years to achieve the 2030 Sustainable Development Goals — and many

signs point to our collective planetary efforts falling short by the time the U.N.’s “Decade of Action” draws to a close. We will continue to work toward the SDGs, but we also will track development of the next plan, set for unveiling in 2030. Regardless of what lies on the horizon for the United Nations, we expect the cross-cutting goal of partnership (SDG 17) will remain a key strategy. As our “unicorn” organization demonstrates, bringing economic development work into dialogue with community philanthropy helps to strengthen local and regional advocacy, while illuminating an awareness of each community’s interdependence with larger global currents. Our unique composition as both a community foundation and regional planning organization offers a case study in the power of partnership between private and public organizations and, specifically, the potential for community foundations to tap economic development agencies for data and direction.

Further, our work with the SDGs is replicable for foundations of all kinds, as a way to link mission, geography, and donors to a larger global framework for community well-being. Our organization’s experiences with the SDGs over the last two years demonstrate the potential for a

framework of well-crafted global goals to foster shared purpose and accelerate change within an organization. And, perhaps more importantly, we have learned that looking beyond our defined geography has helped affirm and improve our local interventions. Finally, we are beginning to unlock the potential of regional and community foundations, such as ours, to engage with, inform, and support economic development efforts by linking the aspirational power of philanthropy with the planning muscle and resources of economic development districts.

We hope that as organizations large and small, and nation-states and geographies across continents, begin seeing their work through a global lens that our collective consciousness will be raised to understand prosperity as a measure of community and planetary well-being, rather than purely financial growth. Our experiences over the span of just two short years have demonstrated to us — and, we hope, to our allies across the field — that the only development worth our investment is that which advances equity across and within communities and guides us toward a future that is better than our past.

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# Executive Summaries

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7

## Doing Philanthropy at the Time of the Sustainable Development Goals: The Case of Fondazione Compagnia di San Paolo

Fulvio Bersanetti, M.A., Filippo Candela, Ph.D., and Paolo Mulassano, Ph.D., Fondazione Compagnia di San Paolo

In 2020, Fondazione Compagnia di San Paolo applied the Sustainable Development Goals as a framework and restructured its operations to focus on three programmatic efforts — Planet, People, and Culture — aligned with those goals. This article provides a case study of the Compagnia di San Paolo’s path to adoption of the framework and the impact of that work using quantitative indicators. The article concludes with a comparison between Compagnia di San Paolo’s approaches and some international best practices to provide a better understanding of the foundation’s long-term positioning in the international context.

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18

## A Case Study on the Use of the SDGs With a Collective Impact Initiative in Southwest Florida

Tessa LeSage, M.P.A., FutureMakers Coalition/Collaboratory; Aysegul Timur, Ph.D., Florida Gulf Coast University; and Dakota Pawlicki, M.P.A., CivicLab

The United Nations Sustainable Development Goals can be a useful framework on which to design, evaluate, and communicate collective impact initiatives. Using as a case study the FutureMakers Coalition, a collective impact initiative launched by the Southwest Florida Community Foundation to transform its region’s workforce, the field can gain insights into how the goals can strengthen collective impact work locally and nationally. The foundation facilitated the setting of a common agenda and the use of the SDGs to help build consensus among 251 active partners on how to measure progress toward the coalition’s shared goal.

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32

## Walking the Talk on Sustainable Development Goals: The Case of Community Foundations in Canada

Marta Rey-Garcia, Ph.D., University of A Coruña and the Canadian Philanthropy Partnership Research Network; and Rosane Dal Magro, M.B.A., Canadian Philanthropy Partnership Research Network

The United Nations 2030 Agenda creates an opportunity for philanthropic foundations to become more collaborative and transformative in their work toward global goals. This article provides global and national context to adoption of the Sustainable Development Goals by Canadian community foundations through a multiple case study. Special attention is paid to the roles played in collective action by the Community Foundations of Canada, grassroots actors, and innovative practices in that process of adoption. Social innovation originating in grassroots work that is diffused horizontally by the Community Foundations of Canada to its member foundations was key antecedent to adoption. Enduring collaboration dynamics involving community foundations, prior engagement with data collection and a shared measurement framework, and space for local discussion and adaptation around the framework are identified as key enablers for adoption. Early effects of adoption for mapping, reporting, and aligning purposes include reframing current work and promoting new activities and leadership roles, paving the way for new partnerships, and providing a coherent planning framework and strategic focus to grantmaking.

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47

## Where to Start? A Tool for Thinking about the SDGs and Community Foundation Work

Katie Leone, M.A., and Tessa LeSage, M.P.A., Collaboratory

This article aims to support community foundations in moving the 2030 Agenda for Sustainable Development forward in practical ways by exploring the use of a point-of-entry wheel to create a shared language that can help community foundations align their local efforts with the global goals. Since 2012, Collaboratory has been exploring the potential for integrating sustainability — encompassing economic, social, and environmental pillars — as a strategic framework to advance its mission in a five-county region in Southwest Florida. The article examines how the foundation developed the wheel and applied it to its philanthropic work, presenting examples of success and failure and discussing where the tool has been most helpful and has added undue burdens. Collaboratory found that the process of SDG alignment made its local philanthropic work more coherent, relevant, and adaptable over time. The foundation also identified areas where further peer-learning between practitioners in the field is needed to refine approaches and processes and to build philanthropic capacity around the global goals.

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59

## Localizing the 2030 Agenda With Community Data: Lessons From the Community Foundations of Canada's Vital Signs Program

Beth Timmers, Ph.D., International Institute for Sustainable Development; and Alison Sidney, B.A., Community Foundations of Canada

This article analyzes the critical role that community indicators can play in philanthropy's ability to localize the United Nations 2030 Agenda for Sustainable Development and the associated Sustainable Development Goals to address complex societal and environmental challenges. Measurement is an integral component of Agenda 2030, and communities are increasingly using indicators to align their plans, inform granting decisions, and track equity and sustainability outcomes. This article highlights case studies from three community foundations in Canada that have successfully localized the 2030 Agenda by aligning their Vital Signs data and associated programming with the SDGs to coordinate community action. Community indicator initiatives like those used in Vital Signs research are useful tools to help philanthropic organizations accelerate community-level SDG implementation and tackle complex, intersecting challenges related to sustainability, equity, and justice. In turn, a data-driven approach to localizing the SDGs can strengthen the philanthropic sector's ability to target its impact on the issue areas and populations that need it most.

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74

## The Transformative Power of the 2030 U.N. Sustainable Development Goals

Anna Wasescha, Ph.D., West Central Initiative; Christa Otteson, M.A., Vela Strategy; and Sarah Casey, West Central Initiative

The West Central Initiative, a mostly rural community foundation and regional development organization in Minnesota, integrated the United Nations 17 Sustainable Development Goals into its strategic plan in 2019. This article describes the strategic planning process that led to adoption of the goals, articulates how they have helped evolve the interplay of economic development and philanthropy, and identifies lessons learned from the first two years of working with the goals. The new, transformative vision for the foundation centers diversity, equity, and inclusion as essential building blocks of both successful regional development and place-based philanthropy. Any region — anywhere — with a successful regional economy that also is supported by effective community philanthropy would look like the Sustainable Development Goals, realized.

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