

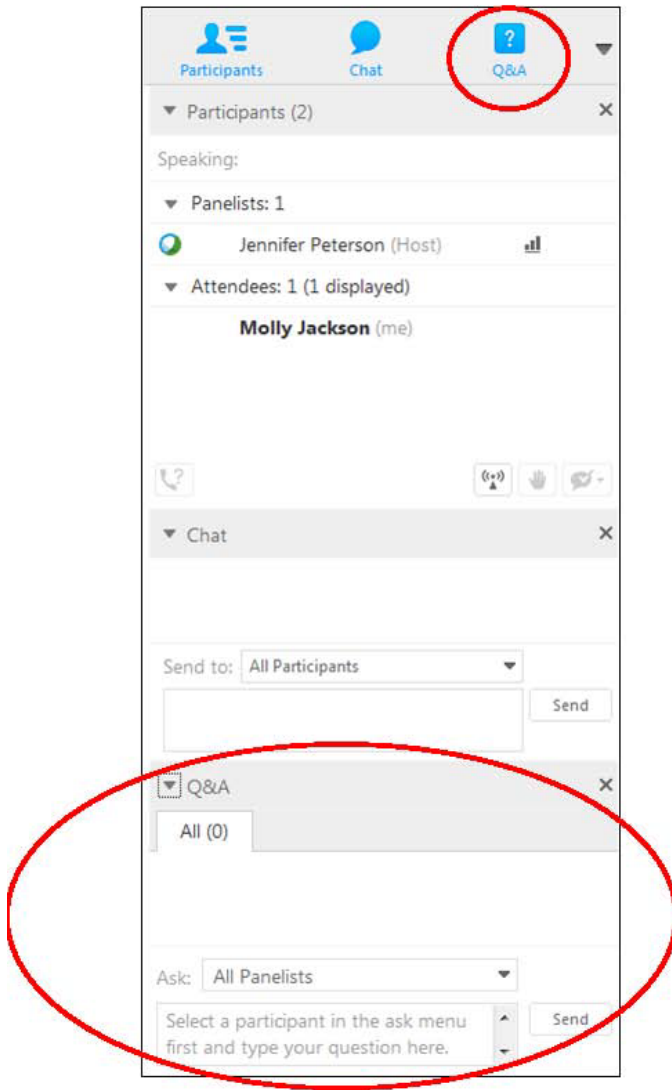


# THE STRATEGIC COINVESTOR APPROACH

Lessons From Family-Centered Community Change

March 18, 2021

# Housekeeping



- If you experience technical difficulties during this webinar, visit [www.aecf.org/webex](http://www.aecf.org/webex) for guidance. If you still have trouble, notify us using the chat or Q&A window, or contact WebEx technical support at 1-866-229-3239.
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- The webinar is being recorded and will be available on the Casey website ([aecf.org](http://aecf.org)) later this month.

# Today's Speakers

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**Lakeshia Bragg**  
United Way of San Antonio and  
Bexar County



**Kantahyanee Murray**  
The Annie E. Casey Foundation



**Henrietta Muñoz**  
Texas A&M University-San Antonio



**Jared Raynor**  
TCC Group

# Agenda

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1. FCCC Context
2. The Strategic Coinvestor Approach
3. Community Conversation – San Antonio Dual Generation Partnership
4. Q&A
5. Next Steps and Closing

# The Family-Centered Community Change Initiative

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In 2012, the Annie E. Casey Foundation launched its seven-year **Family-Centered Community Change™ (FCCC)** initiative to support local partnerships in three high-poverty neighborhoods as they developed a more integrated set of services — including high-quality education, job training and housing assistance — to help parents and children succeed together in what is known as a “two-generation approach.”





## A New Approach: Strategic Coinvestor

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- Rather than creating something new, the Foundation sought to be a strategic coinvestor — a unique mindset and a departure from more directive approaches.
- Casey provided technical assistance, trainings and peer learning opportunities to build on the existing partnerships' community change efforts.
- The Foundation commissioned a third-party evaluation by TCC Group to document lessons for adapting the approach in the future.

# Evaluating the Strategic Coinvestor Approach

# Core Components

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1

Flexible grant funding (of which a percentage is for use at the local site's discretion)



2

A high-touch staffing model, with significant in-person time from the Foundation



3

A non-directive relationship, with the funder deferring to local discretion in program design and implementation of an agreed-upon topic



4

An assumption that the work is done in collaboration with other investing and implementing partners (including other funders)



5

The funder serves as a strategic thought partner and sounding board while providing on-demand technical assistance



6

Facilitation of networking and learning across sites



7

Nesting of a focused issue within an existing broader community change effort



8

Ongoing evaluation of the investment approach



# Evaluation Design

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1. Initial benchmarking of other community-based investment models
2. Ongoing evaluation activities
  - Pulse-check surveys
  - Site visits
  - Monitoring of requests
  - Events
3. Reporting to Casey and community partners

# Lessons for Communities and Funders

## LESSONS FOR THE COMMUNITY



**The approach requires community representatives to change their thinking about the relationship with the funder.** This includes a willingness to push back when there is a difference of opinion and being open to an authentic conversation about the best course.



**Plan how (and why) to use technical assistance** before it is received and what follow-up and implementation support will be necessary. It is also important to understand the desired result for the technical assistance to be effective.



**Nesting of a program or concept within a broader community change initiative is effective but not necessarily natural.** Value and sustainability come from building on existing infrastructure and vision. It's critical to keep paying attention to how the work is positioned, so that it doesn't become siloed and lose the value of contributing to broader change.



**Defining the core components of the work,** even as adaptation happens, is important to communicating the concept and managing multiple investor relationships.



**The approach benefits from having a backbone organization to help partners understand their unique value and role to the success of the whole.** With so many entities involved in a strategic coinvestor approach, organizations can lose sight of how they fit in, which can undermine the strength of relationships.

## LESSONS FOR THE FUNDER



**Jointly identify and name** non-negotiables and core values at the beginning of the initiative.



**Be prepared to show up fully.** This includes building trust and relationships, providing advice and resources and spending time to learn from data, none of which this happens fast or automatically.



**Fit is crucial.** An initial getting-to-know-you process may make it more likely that a mutually supportive relationship is established between the funder and the community change initiative.



**Suggest (but don't mandate) areas where technical assistance may be useful.** A responsive approach doesn't mean waiting for the community to ask; it means being committed to having a dialogue about what assistance might be valuable and when.



**Evaluation can be one of the trickiest parts.** Evaluation approaches should follow the same principles as other elements of the strategic coinvestor approach, including joint construction of evaluation goals and methods.



**The approach alone does not eliminate power dynamics.** Funders need to continually ask for feedback and provide opportunities for engagement with all implementing partners.

<https://www.aecf.org/blog/lessons-from-caseys-strategic-coinvestor-approach-to-community-change/>

# Today's Focus

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1

Flexible grant funding (of which a percentage is for use at the local site's discretion)



2

A high-touch staffing model, with significant in-person time from the Foundation



3

A non-directive relationship, with the funder deferring to local discretion in program design and implementation of an agreed-upon topic



4

An assumption that the work is done in collaboration with other investing and implementing partners (including other funders)



5

The funder serves as a strategic thought partner and sounding board while providing on-demand technical assistance



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Facilitation of networking and learning across sites



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Nesting of a focused issue within an existing broader community change effort



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Ongoing evaluation of the investment approach

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# Community Conversation

# San Antonio Dual Generation Partnership

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# Non-Directive Relationship

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3

A non-directive relationship, with the funder deferring to local discretion in program design and implementation of an agreed-upon topic

# Nesting

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7

Nesting of a focused issue within an existing broader community change effort



# Ongoing Evaluation

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Ongoing evaluation of the investment approach

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# Q&A Discussion

# Next Steps and Closing

To learn more, visit:

<https://www.aecf.org/blog/lessons-from-caseys-strategic-coinvestor-approach-to-community-change/>

THE STRATEGIC COINVESTOR APPROACH

COMPONENTS AND LESSONS

In 2012, the Annie E. Casey Foundation launched its seven-year Family-Centered Community Change™ (FCCC) initiative to support local partnerships in three high-poverty neighborhoods as they developed a more integrated set of services — including high-quality education, job training and housing assistance — to help parents and children succeed together in what is known as a “two-generation approach.” Rather than creating something new, the Foundation joined these partnerships, located in Buffalo, New York; Columbus, Ohio; and San Antonio, Texas, and provided technical assistance, trainings and peer learning opportunities to build on their community change efforts. Casey called this method of joining an ongoing initiative being a strategic coinvestor — a unique mindset and a departure from more directive approaches. The strategic coinvestor approach had eight components:

1

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4

An assumption that the work is done in collaboration with other investing and implementing partners (including other funders)

5

The funder serves as a strategic thought partner and sounding board while providing on-demand technical assistance

6

Facilitation of networking and learning across sites

7

Nesting of a focused issue within an existing broader community change effort

8

Ongoing evaluation of the investment approach and the funder’s role

THE ANNIE E. CASEY FOUNDATION

LESSONS FROM AN EVALUATION

Completed a seven-year evaluation of the strategic coinvestor approach in Family-Centered Community Change. This data from implementers, community members and Foundation staff and consultants. Results revealed:

LESSONS FOR THE COMMUNITY

The approach requires community representatives to change their thinking about the relationship with the funder. This includes a willingness to push back when there is a difference of opinion or an authentic conversation course.

Plan how (and why) to use technical assistance before it is received and what follow-up and implementation support will be necessary. It is also important to understand the desired technical assistance to be effective.

Nesting of a program or concept within a broader community change initiative is effective but not necessarily natural. Value and sustainability come from building on existing infrastructure and a to keep paying attention to how the work is that it doesn’t become siloed and lose contributing to broader change.

Defining the core components of the work, even as adaptation happens, is important to communicating the concept and managing multiple investor relationships.

The approach benefits from having a backbone organization to help partners understand their unique value and role to the success of the whole. With so many entities involved in the approach, organizations can w they fit in, which can undermine the relationships.

LESSONS FOR THE FUNDER

**Jointly identify and name** non-negotiables and core values at the beginning of the initiative.

**Be prepared to show up fully.** This includes building trust and relationships, providing advice and resources and spending time to learn from data, none of which this happens fast or automatically.

**Fit is crucial.** An initial getting-to-know-you process may make it more likely that a mutually supportive relationship is established between the funder and the community change initiative.

**Suggest (but don’t mandate) areas where technical assistance may be useful.** A responsive approach doesn’t mean waiting for the community to ask; it means being committed to having a dialogue about what assistance might be valuable and when.

**Evaluation can be one of the trickiest parts.** Evaluation approaches should follow the same principles as other elements of the strategic coinvestor approach, including joint construction of evaluation goals and methods.

**The approach alone does not eliminate power dynamics.** Funders need to continually ask for feedback and provide opportunities for engagement with all implementing partners.

Learn more about Family-Centered Community Change at [aecf.org/work/community-change/](https://aecf.org/work/community-change/)

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*Developing solutions to build a brighter future  
for children, families and communities*

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