

# Learning from COO 2014-2021: Reflections and Learnings to Improve Future Practices

## Overview

With the renewal of the Best Starts for Kids Levy and continued philanthropic support, Communities of Opportunity (COO) is positioned to continue investing in transformational change through 2027. Throughout the first levy, COO collected feedback and evaluation reports on various aspects of our work.

Over the course of 2022, COO staff and leadership will be reflecting on and integrating the learnings from the last 8 years of the initiative.

**The intention of this report is to summarize recommendations for how COO works with partners and how COO Staff work internally and with each other (Public Health and Seattle Foundation staff).**

Additionally, this report seeks to identify opportunities to clarify and expand values and improve funding, resources, relationships, and activities that COO provides to community partners.

## Process & Methods

Cascadia reviewed and analyzed 21 reports to summarize recommendations for how COO works with partners and internally as a staff team. Cascadia compiled the following data on each of the reports: 1) General Feedback; 2) Things to Maintain; 3) Opportunities for Improvement; 4) External Recommendations; and 5) Internal Recommendations.

All of the reports are available at the links in the table below. Note that several of the programs referenced took place during COVID-19 and so activities were virtual.

#	<u>Reports</u>	<u>Date of Program(s)</u>	<u>Date of Report</u>
1	<a href="#">COO Evaluation Report Executive Summary for 2020 Evaluation Findings</a>	2020	May 2021
2	<a href="#">COO Evaluation Report for 2019-June 2020</a>	2019 – June 2020	July 2020
3	<a href="#">COO Evaluation Report 2019 (July 2020)</a>	2019 – June 2020	July 2020
4	<a href="#">BDS Partnerships Community of Practice findings</a>	2021	Dec 2021
5	<a href="#">Vision Change Win</a>	2021	Dec 2021
6	<a href="#">Learning Community Capacity Building Report 2021</a>	2021	Dec 2021
7	<a href="#">LC Evaluation Report by Leika Suzumura</a>	2021	March 2022

8	<a href="#">COO Systems &amp; Policy Change Program, Evolution &amp; Influence by Ellen Kissman</a>	2014 - 2021	August 2021
9	<a href="#">COO 2.0 Program Implementation &amp; Operations Draft by Ellen Kissman</a>	2014 – 2020	September 2020
10	<a href="#">COO Place-Based &amp; Cultural Communities, Program Evolution &amp; Influence by Ellen Kissman</a>	2014 – 2021	March 2022
11	<a href="#">Equitable Contracting Review</a>	Sept 2021 – Feb 2022	Feb 2022
12	<a href="#">Policy &amp; Systems Change 2021 reports</a>	April 2020 – Dec 2021	Dec 2021
13	<a href="#">LC Coaching Evaluation Intern project</a>	2020 - 2021	June 2021
14	<a href="#">Learning Community mini-grant reports</a>	2021	Dec 2021
15	<a href="#">Resource Media Narrative recommendations 2020</a>	2020 – Feb 2021	Feb 2021
16	<a href="#">Commercial Affordability evaluation/report</a>	2021	Jan 2022
17	<a href="#">LC Evaluation Synthesis (Cascadia)</a>	2021	Dec 2022
18	COO Speaker Series Feedback ( <i>included in LC Evaluation Synthesis</i> )	2021	Dec 2022
19	<a href="#">Research / Interviews / Synthesis – Best Practices from other Initiatives (Zielinski)</a>	2019 – 2020	Jan 2022
20	<a href="#">Memo to COO Director Observations &amp; Recommendations for GG 2.0</a>	2020 - 2021	August 2021
21	<a href="#">Systems &amp; Policy Cohort 2018</a>	2018 – 2019	2019

The data was then summarized into themes such as relationships, funding model, community engagement, and other topics. The observations and recommendations include in-line citations to denote which report(s) the feedback came from.

## General Feedback

- Community partners faced compounding impacts from the COVID-19 pandemic while showing incredible resilience (1, 2).
  - Partners faced a higher burden of COVID-19 compounding impacts, including the lack of affordable housing, and increasing risks of displacement.
  - Partners were able to pivot and leverage partnerships to respond to community needs.
- Several partners' reports point to ongoing capacity needs around staffing (3, 12).
  - There are ongoing challenges of staff leadership turnover and staff capacity due to a number of factors including burnout.
- Project Monitors (PM) are vital to building trusting and authentic relationships with partners (10, 12). They have the best pulse on what is happening with partners.
- There is a need for continued messaging and storytelling about COO's values, vision, and impacts (15, 19).

- Resource Media provided specific narrative recommendations, an elevator pitch, and audience mapping to support this work.
- This includes sharing out the lessons learned, governance priorities, investment priorities, and communicating and evaluating stories of COO’s impact.
- Investing in relationships and partnerships remains an ongoing need (2, 3, 10, 14).
  - Partnerships and collaboration are critical but are time and resource intensive.
  - Partners expressed the desire for more opportunities for collaboration amongst communities including exploring and unpacking power dynamics amongst backbone organizations and sub-grantees (10).
    - Ex. The lead agencies were assigned a new responsibility that put them in the position of facilitating a decision-making process for its partnership’s grant funds to be distributed to themselves and other partners. Partnerships were not given sufficient time to prepare for this new approach and needed to respond quickly. Upon reflection, they expressed concerns that they didn’t have the internal capacity, appropriate infrastructure (e.g., agreements), or, in some cases, the skills necessary to negotiate the changed relationships.
  - Since relationship and partnership building work takes time and staff capacity – it should be resourced adequately (14).
- There is complexity in supporting community driven development projects (16).
  - A solution tailored to one business owner may not make sense or be helpful for another.
  - The commercial affordability pilot demonstrated that programs must be flexible, comprehensive, and responsive to the needs of diverse businesses through a combination of financial, business, and project technical assistance.
  - There is a need for trusted advocates to help guide the process and build financial and political support for projects.

## Observations

A summary of the key observations including things to maintain and opportunities for improvement. The observations are categorized by theme (e.g., relationships with COO staff, consultants, and coaches). Each of these findings includes which value(s) underly the observations.

A summary of the values is below.

Values	Where they show up?
<b>Racial equity as central to mission of COO.</b>	<ul style="list-style-type: none"> <li>• Funding model</li> <li>• Programming, Workshops, and Learning Activities</li> <li>• Communications</li> <li>• Evaluation &amp; Reporting</li> </ul>
<b>Community leadership and ownership.</b>	<ul style="list-style-type: none"> <li>• Community engagement</li> <li>• Programming, Workshops, and Learning Activities</li> </ul>

<b>Foundational importance of relationships.</b>	<ul style="list-style-type: none"> <li>• Relationships with COO staff, consultants and coaches</li> <li>• Partnership support</li> <li>• Programming, Workshops, and Learning Activities</li> </ul>
<b>Balance responsive funding needs with long-term funding opportunities.</b>	<ul style="list-style-type: none"> <li>• Funding model</li> </ul>
<b>Ongoing space for reflection and learning.</b>	<ul style="list-style-type: none"> <li>• Evaluation &amp; Reporting</li> <li>• Partnership support</li> </ul>

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## RELATIONSHIPS WITH COO STAFF, CONSULTANTS, AND COACHES

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### THINGS TO MAINTAIN

- COO staff and consultants are seen as trusted advisors, supporters, and advocates of the work (2, 12, 12, 21).
  - Continue to perform conversational midyear check ins and maintain one-on-one connections between staff/consultants and partners.
  - Additionally, partners recommended continuing to hire trusted coaches to support partners.

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### OPPORTUNITIES FOR IMPROVEMENT

- Expand relationship building opportunities amongst partners and consultants (12, 13, 14).
  - Provide networking opportunities between COO partners such as through convening meetings where partners can get together to share about lessons learned or challenges.
    - One partner suggested developing a Slack or similar platform to connect partners in an informal and ongoing way.
  - Additionally, several reports suggested regular group check-ins with consultants, coaches, and COO staff.

*Values: Foundational importance of relationships.*

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## FUNDING MODEL

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### THINGS TO MAINTAIN

- Continue to create opportunities for responsive funding (1, 2, 8, 9, 11, 16).
  - Continue to provide flexibility with scopes of work to allow space to respond to emerging community needs, including providing flexibility with contract deliverables and timelines.
  - Within the community driven development body of work, continue to combine debt and grant funding, ensuring that debt financing is provided by community-minded

lenders and backed by credit enhancements to increase access to capital and that grant funding is right-sized to fill financial gaps.

- Continue to evaluate, assess, and incorporate contracting best practices.

*Values: Balance responsive funding needs with long-term funding opportunities.*

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## OPPORTUNITIES FOR IMPROVEMENT

- Equity in funding, processes, and programs by focusing on BIPOC-led organizations and policy and systems change work. (9, 21)
  - Create an application process that recognizes different writing standards due to diversity in education and English fluency

*Values: Racial equity as central to mission of COO.*

- Refine and clarify contract language (9, 21).
  - Examine and change contracting models that have inequitable power relationships.
  - Give grantees more comprehensive and earlier notice and clarity about expectations regarding reporting.
  - Specific suggestions:
    - Align all contracts with fiscal or calendar year.
    - Clarify whether lobbying is allowed or not.
    - Allow partners to define deliverables.
- Expand amount and type of funding available (2, 4, 12, 21).
  - Continue or extend existing funding.
  - Provide additional funding for capacity building:
    - Invest in operational stability of organizations including professional development trainings and organizational infrastructure.
    - Consider resources to address staffing capacity issues.
    - Extend funding beyond programming.
  - Balance need for responsive and long-term funding opportunities.
    - Consider impacts of flexible funding (e.g., too much flexibility with funding can cause conflict within partnerships).
    - Create opportunities for new, multi-year funding program.
  - Meet partners where they are at in terms of funding needs.
    - Assess partners individually and identify best-positioned grantees to maximize funding opportunities.
    - Account for smaller organizations needing more time and money than other grantees.

*Values: Balance responsive funding needs with long-term funding opportunities.*

- Transparent decision-making process and organizational structure (21).
  - Simplify process and increase transparency of organizational structure (e.g., COO org chart),
- Encourage other funders to support policy and systems change work (19).
  - Consider presenting multiple investment options for funders that include a short-term lane for tactics and actions, and a long-term one for systems change.
  - Need for coordination and research to identify inter-organizational alignment and natural partnerships.

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## COMMUNITY ENGAGEMENT

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### THINGS TO MAINTAIN

- Center community as experts and leaders (2, 3, 16, 18).
  - Continue to center and elevate Black, Indigenous, and People of Color (BIPOC) voices.
  - Continue to support opportunities to engage and develop leadership among youth.

*Values: Community leadership and ownership.*

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### OPPORTUNITIES FOR IMPROVEMENT

- Expand co-design of programming with community (4).
  - Consider opportunities to build a collective strategy and impact by engaging partner organizations and the broader community.

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## COMMUNICATIONS

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### THINGS TO MAINTAIN

- Center racial equity and policy and systems change (19).
  - Continue to center and communicate COO's work to advance racial equity.
  - Communicate that policy and systems change work requires a long-term commitment.

*Values: Racial equity as central to mission of COO.*

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### OPPORTUNITIES FOR IMPROVEMENT

- Expand communications and storytelling work (1, 4, 13, 19, 21).
  - Create orientation materials about COO and the Learning Community to share with partners.
  - Model racial equity through values and communications strategy by highlighting community voice and framing policy and systems change work.

- Give more attention to community voice **Partnership support**

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### THINGS TO MAINTAIN

- Continue partnership building work (1, 5).
  - Continue learning and sharing how to build collective agreements and commitments to each other and partnership as a whole.
  - Leverage the lessons learned and successes from past partnership building work.

*Values: Foundational importance of relationships.*

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### OPPORTUNITIES FOR IMPROVEMENT

- Additional programming needed for partnership work (2, 5, 14).
  - When conflicts arise in partnerships, consider conflict management and partnership building exercises led by external consultants, particularly someone trained in mediation or conflict transformation.
  - Consider additional institutional support and resources towards completing conflict work plans. This could be completed through structured workshops or one-on-one meetings from COO staff or consultants.
  - Provide support drafting shared language around strong partnerships to share with partners.
  - Provide additional support to help communicate new protocols to wider partnership membership.
- Build in additional time and resources for relationship and partnership work
- Coalition building can be time-consuming and difficult, especially with funding decisions (2, 5).
  - Working in partnership requires upfront investments of time and resources for trust building.
  - COO should continue to provide resources to ensure there is capacity for multiple people to move partnership work forward.

*Values: Ongoing space for reflection and learning.*

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## PROGRAMMING, WORKSHOPS, AND LEARNING ACTIVITIES

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### THINGS TO MAINTAIN

- Continue to provide access to a variety of learning opportunities and hire community experts to lead (13, 14).
  - Provide free, individualized coaching that is flexible to participants needs.
  - Ideally, hire community-based coaches with direct experience and knowledge of the community being served.
  - Continue to hire and work with BIPOC consultants with deep knowledge and relationships with community.

*Values: Foundational importance of relationships.*

*Values: Community leadership and ownership.*

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## OPPORTUNITIES FOR IMPROVEMENT

- Expand programming opportunities (6, 14, 16).
  - Several consultants provided examples of potential specific additional learning opportunities, including:
    - Storytelling around the history of different BIPOC communities in the region.
    - Partners to visit each other’s work locally, regionally, and nationally.
    - Create resource list of trusted and endorsed facilitators and other consultants.
    - Provide coaching and peer support for backbone staff.
  - Additionally, there were several examples of new programming opportunities within the community driven development body of work (16).
    - Expand the commercial affordability pilot into a permanent program.
    - Provide technical assistance to small businesses earlier in project development to navigate complex systems and ensure small businesses are equipped with the resources they need to succeed.
    - Provide credit enhancements to offset the additional risk.
    - Design a program that can reach more types of businesses at various stages.
- Diversify and scaffold activity delivery to increase engagement (12, 21).
  - Utilize creative and embodied facilitation techniques to keep partners engaged during virtual activities.
  - Ensure a shared understanding of terms and accommodate for varying levels of knowledge of specific topics.

*Values: Racial equity as central to mission of COO*

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## EVALUATION & REPORTING

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### THINGS TO MAINTAIN

- Ongoing check ins to share progress and lessons learned (12).
  - Continue to perform conversational midyear check ins and maintain one-on-one connections between staff/consultants and partners.

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### OPPORTUNITIES FOR IMPROVEMENT

- Shift evaluation framework (4, 17, 19).
  - Create a culture of evaluation amongst staff, consultants, and partners to consistently assess skills, capacities, and relationships built.
  - Since changing systems can be a slow process, identify milestones and timeline to generate a sense of progress and maintain motivation.



- Be accountable to racial equity by modeling silo-busting, including equity measures and anti-racism into programs' logic models, deliverable KPI for deepening relationships, deliverable KPI for sustaining staff and non-staff emotional wellbeing.

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*Values: Ongoing space for reflection and learning*

*Values: Racial equity as central to mission of COO*

- Consider shortening written report (21).
- Center racial equity within data collection and analysis (4, 9).
  - Increase and improve consistency of data collection.
  - Use a race and social justice lens on data collection and evaluation.
  - Increase community involvement especially regarding impact analysis & validation.

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*Values: Racial equity as central to mission of COO*

## Recommendations

Recommendations are organized by the number of times they emerged in the reports. The frequency with which they emerged is in brackets. The reports that reference the recommendations are in parentheses.

### External Recommendations

The following recommendations relate to how COO works with and can best support community partners in formal and informal partnerships, COO-developed programming, and reporting and evaluation.

## PROGRAMMING

- Capacity building and tools to deepen operational stability [6]
  - Continue to provide tools and best practices that help partners with strategy and budget planning (1).
  - Provide training in how to position grantees work as “market worthy” (21).
  - Integrate resources for capacity building into projects and funding (6).
  - Assist with capacity-building opportunities through trainings in facilitation, conflict mediation, data collection and evaluation (3).
  - Assist partners with clarifying job descriptions, refining their hiring processes, providing clear definition regarding roles, and clearly communicating expectations (3).
  - Provide support for partners for communication planning and activities to share their stories and their work (2).
- Consider programming opportunities to address burnout [4]
  - Day-long trainings on collective impact model (4).
  - Build a toolkit to respond to conflict and build accountability within a group or oneself (4).
  - Support with realistic steps/actions for addressing burnout and low capacity (5).
  - Create more opportunities for the whole cohort to be together, rather than in small groups (21).
- Expand support for community driven development [4]
  - Partner with a Community Development Financial Institution (CDFI) to provide debt financing (16).
  - Ensure that the entrepreneur remains centered, informed, listened to, and the final decision-maker (16).
  - Ground commercial affordability efforts in the communities the program serves (16).
  - Local governments or community organizations can take the pressure off small business owners by strategically acquiring affordable commercial spaces (16).
- Peer learning and mentorship opportunities [2]
  - Identify how partners’ skills complement each other (1).

- Play a convener role to have organizations train each other in various skills and insight development (21).

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## PARTNERSHIPS

- Support partnerships through programming [6]
  - Provide training, coaching, and/or consultants for partnership building including how to be a supportive lead agency, strategic planning, policy & systems change, leadership development, equity, conflict resolution, and other skills (2).
  - Develop resources for partners that highlight power imbalances in contracting, especially how to dismantle the nonprofit industrial complex (4).
  - Provide executive leadership coaching to organizations which serve as the “backbone” or coordinate the partnerships (4).
  - Create additional space to work through conflict in an accountable manner (4).
  - Skill building to support negotiation with partner organizations (10).
  - Support with coalition building through trainings on processes for partnering organizations to identify each other’s goals, strengths, and motivations, how to synthesize this information to use it to form strategic partnerships (3).
- Clarify funder support of partnerships [5]
  - Clarity on COO’s expectations for partnerships (lead & partnering organizations) roles and responsibilities (2).
  - Consider alternative partnership structures/models from the current “lead agency” model (2).
  - Consider changes to contracting and funding requirements to meet the needs of the communities being served (4).
  - Clear expectations and communicate what is expected from all parties, especially when conflict arises (5).
  - Offer a variety of support for partnerships: TA, regular check-ins, more/less structure, access to conflict resolution support (9).

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## REPORTING & EVALUATION

- Update metrics and measure impact [4]
  - Examine program impact through additional lenses such as working across result or issue areas, levers of system and policy change, level of government, and elements of community engagement (8).
  - Structure evaluation around measures that are both funder and community-defined (9).
  - Build on Results Based Accountability model (9).
  - Improve COO’s tracking of data of outcomes over time, plus support grantees in tracking their impacts and activities over time (9).
- Streamline reporting requirements [3]
  - Evaluate COO Reports’ length and complexity to streamline reporting requirements (12).

- Communicate reporting questions in the award letter to ensure partners are aware from the start about the length and required resources and information to complete reports (12).
- Provide technical assistance on how to translate organization’s work into the required report format (21).

## Internal Recommendations

Partners shared feedback and recommendations on how COO works internally, and how COO may improve processes from an outsider’s perspective.

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## CONTRACTS

- Set clear expectations within contracts [3]
  - Set clear expectations for grantees in terms of contract requirements depending on stage of development, projects working in multiple result areas, movement building, and multi-year funding (9).
  - Address gray area between capacity and project level grants (21).
  - Provide clarity around any potential requirements or restrictions. E.g., Within a partnership, the lead agency should be a neutral party, meaning that it shouldn’t have a COO-funded strategy that might contribute to conflict of interest (2).
- Expand timing and amount of funding [3]
  - More time for funding – at least 1 year for mini grants (10, 14).
  - More funding for mini grants (14).

## GOVERNANCE GROUP

- Center equity within Governance Group process [7]
  - More separation between grantees and governance (9).
  - Assign new GG members a “GG mentor” (20).
  - Set clear expectations for GG members (20).
  - Clarify the role of GG meetings attending staff and invited guests (20).
  - Add more “breathing room” to the Governance Group monthly meeting agendas by adding more time to meeting, create small group conversations, or send out pre-reads or pre-work (20).
  - As COO reaches organizational maturity, shift power away from founders (20).
  - Assess the current skill sets within the governance group, and ensure they focus on relevant areas like health, economic development, racial justice, housing (20).
- Expand community voice within Governance Group and other Advisory Groups [3]
  - Give more seats to community partners, moving from 20% to 50%+ community seats (20).
  - Bring community into review process (21).
  - Build in more workgroups and conversations with community (4).

## COMMUNICATIONS

- Clarify and communicate values [4]
  - Provide clarity on COO definition of equity (2).
  - Clearly and consistently articulate and center values so that community partners are aware of what values COO will abide by as a funder (6).
  - Improve understanding of what “community connections” means (9).
  - Communicate values to community partners (15).

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## ENGAGEMENT WITH OTHER FUNDERS

- Conduct outreach to other funders [5]
  - Facilitate relationships with funders and community partners outside of COO to communicate value of COO and build critical connections (1, 3).
  - Create awareness of COO with the public sector, philanthropy, higher education, and the private sector (15).
  - Find ways to align other County departments with the work of COO (4, 9).
- Connect partners with other aligned funders [3]
  - Leverage additional aligned philanthropic involvement (9).
  - Expand COO funders in addition to Seattle Foundation such as those who are looking to reduce inequities in health, housing, and economy (12, 15)

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## COO STAFF CAPACITY BUILDING

- Skill building and training [2]
  - COO and consultants deepen understanding of generative conflict and how it applies to institutional culture (5).
  - Continue trainings around anti-racism and dismantling anti-Blackness (9).
- Examine opportunities for internal systems change (1).