

NATION  
SWELL

COLLABORATIVES



A toolkit to guide thoughtful, community-led,  
effective measurement of place based impact.

# THE PRINCIPLED APPROACH

*A guide from the NationSwell Place-based Impact Collaborative*



---

Visit the Place-based Impact Funder Guide to learn more.

[placebasedimpact.nationswell.com](https://placebasedimpact.nationswell.com)

# THE QUIET REVOLUTION: A PRINCIPLED APPROACH TO MEASUREMENT

As a parent, it became apparent to me early on that accountability for actions would be an important lesson for my kids. Morality will take you so far — don't hit your friend when they take your toy because it's not a nice thing to do — but at some point children start to encounter objective measures of success, and grapple with the consequences of falling short. It makes sense. As humans, we naturally strive for a sense of progress to give our lives purpose; and as competitors for resources, we are incentivized to reach for constant improvement, so we can prove our worth and communicate it to the world.

*Businesses figured out a system of measurement for achievement that they could all agree on some time ago: one that revolves around money. The social sector, on the other hand, is still trying to define the ways in which we should be comparing different efforts, and what counts as “success.”*

There have been huge strides — the UN Sustainable Development Goals, for instance, provide a universal operating system for cross sector organizations and leaders to work together to tackle gnarly challenges. However, achieving such universal applicability has major drawbacks — critics of the SDG framework<sup>1</sup> cite lack of evidence-backed definitions or community level relevance as major challenges to quantifiable accountability. High-level goals are inspiring; and are also not enough. Thus, what happens in practice is funders require different types of evidence to support the stories they want to tell. Scratch the surface of any broadly



aligned programs, and you reveal a complex web of intersecting and often cumbersome Key Performance Indicators (KPIs) that nonprofits are attempting to deliver on in order to sustain funding.

“One unified way to measure impact” is regularly named by our community of leaders at NationSwell as the north star of collaborative work streams. It would save so much time! And allow for so much synergy! But is that really possible?

*A core tenet of the work of the NationSwell Place-based Collaborative, and other place-based leaders across the United States, is that impact work must be led by community needs, and be constantly evolving to adapt as those needs shift over time.*

By its very nature, place-based work is bespoke to the specific community it is focused on, with their specific history, environment, cultural identity, industries and skills, opportunities and challenges, and leaders driving the work. With that level of customization, can we expect unity in measurement? As convenient as it would be for comparisons and efficiencies in activation, should that be our end goal?

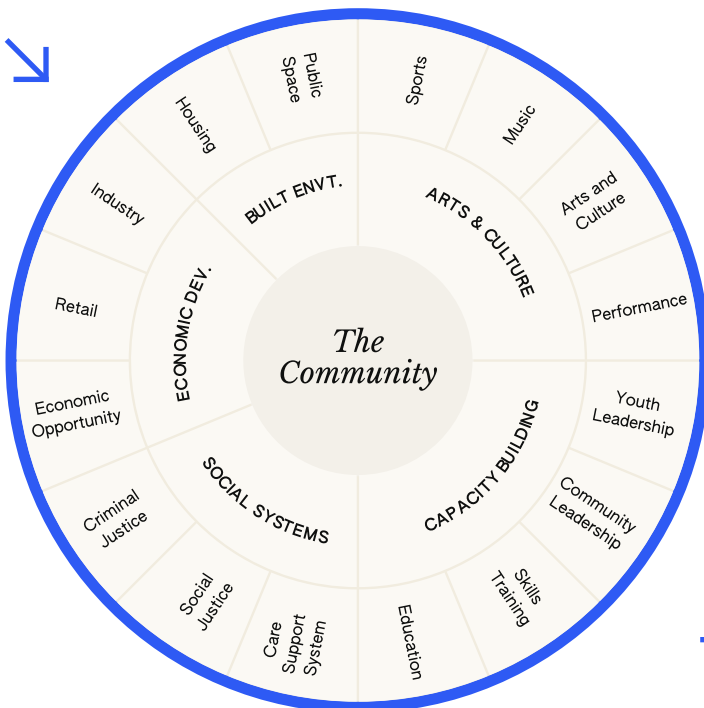
<sup>1</sup> [The Africa Report](#)

## The Principled Approach

Alternatively, you could argue that there are fundamental markers of progress that give everyone faith that something is working. For instance, many transformative ‘cradle to career’ efforts — such as Strive Together, and Partners For Rural Impact — track kindergarten readiness, and high school graduation rates, as vital measures of opportunity for communities across the country, rural and urban. These common achievement measures are obviously linked to how society works, and what is proven to have an impact on people’s lives (e.g., higher levels of education are correlated to higher earning potential<sup>2</sup>). On that basis, we should absolutely be learning from these in-depth, tested approaches and seeing how to move the needle on these fundamental levers.

The NationSwell Place-based Collaborative’s Funder Guide<sup>3</sup> includes a useful dial of needs against which funders can map their strengths against. Plus, the Appendix to this report features an overview of the goals and KPIs that key leaders in this space use in relation to the needs outlined here, so we can all learn from their tried and tested work.

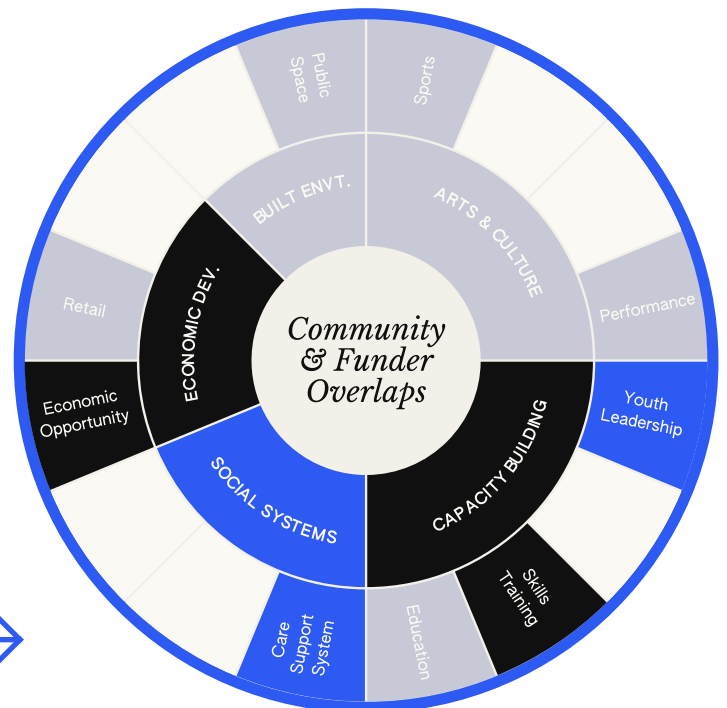
Community dials can be used to map a funder’s strengths to a community’s needs. For more details, please see the [NationSwell Place-based Funder Guide](#).



## Introduction

Our work in impact measurement and place-based initiatives has revealed that you shouldn’t underestimate the innovative power of principles. How you approach measurement — the mindset you take on, and the process you hold yourself accountable to — can be quietly revolutionary. The challenges communities face often demand transformation, not iteration: collapse of industry, historic inequity, political uncertainty, public health crises. These challenges require an approach that is brave and humble enough to be led by the community, and committed enough that it will create lasting, generational change. We cannot — nor should we — prescribe exactly what each place-based initiative should be measuring, because every community is different and constantly shifting. But, we can embrace a principled approach to measurement to ensure that place-based work is achieving its aim: listening to local needs and meeting them. So, we have gathered insights from experts across sectors to provide a blueprint for how to approach place-based impact thoughtfully and effectively, and help you manifest the transformation that the communities you represent and serve, deserve.

**Amy Lee, Chief Strategy Officer, NationSwell**



# APPROACH & CONTENTS

NationSwell created this toolkit with support and collaboration from these organizations: **Annie E. Casey Foundation, BlackRock Foundation, Cisco, George Kaiser Family Foundation, Google Data Centers, KPMG U.S. Foundation, MassMutual Foundation, Partners for Rural Impact, ServiceNow, Starbucks, and Tony Pipa of Brookings Institution.** We are grateful for their partnership.

The contents of this toolkit was created based on NationSwell experience as a strategy and impact measurement advisor, desk research of third party sources and the experience of the contributors (listed on page 16 of this toolkit).

Principle	Case Study	Page
<i>1. Make space at the table</i>	Partners for Rural Impact	4
<i>2. Answer critical questions</i>	McKnight Foundation	6
<i>3. Follow roots and ripples</i>	Spartanburg Academic Movement	8
<i>4. Start small and build up</i>	Learn to Earn Dayton	10
<i>5. Embrace progress over perfection</i>	Coalfield Development	12
<i>6. Look to the future</i>	ImpactTulsa	14

# 01 MAKE SPACE AT THE TABLE

*“There is power in who gets to ask the questions, and who gets to decide what happens with the data.”*

Dr. Amber Banks, PHD, Founder, The Center for Trust and Transformation

This may seem like an obvious request. You have set out to make a positive impact in a particular town, a ZIP Code, a city, a region. So, you will shape how you measure success against the needs of the people you are talking to in that place, presumably? That is often the intention; but that intent can get watered down by the pressures of expediency and internal alignment. Notes from an interview with a stakeholder, or points raised in a town hall with the community, will be logged and reviewed; but it may seem easier and quicker for funders to then revert back to a measuring system that is tried and tested within their organization.

For place-based work to be truly effective, we must resist this urge to revert. Measurement of impact is a powerful act, and we need to be thoughtful about how to use that power. Declaring an initiative in a community “a success” has real-life implications for the people living there. By defining the measures of success with the community — and, where possible, inviting them to participate in monitoring, evaluation and reporting of impact (what’s sometimes called ‘participatory measurement’) — for any funded program or policy change, you are ensuring the community has the power to navigate the longer term impact of those decisions. And by creating a rigorous, data-backed framework to monitor change against those measures, funders can empower their organization to move the needle on entrenched challenges and lead the field.

## Put this principle into practice:

- Actively listen to your community before creating goals and KPIs (we recommend consulting the [Tamarack Institute Engagement Continuum](#) for guidance on best practice).
- Honor the value of community insights and avoid “measurement burn out” or “survey fatigue”: consider compensation for community time, childcare during meetings, or sharing your tools.
- Define measures of success based on real and articulated local needs.
- Consider language: make sure how you define and discuss measurement resonates with the community.
- Give key community members a seat at the measurement table, through definition, monitoring, evaluation and reporting — see the [Community Champion’s Strategy](#) put in place by Partners for Rural Impact in the following case study.
- Create a simple, rigorous framework for tracking community-led measurement to give your organization the tools and confidence to endorse this approach.

## *How Partners for Rural Impact employs a Community Champions Strategy to shape goals and measurement*

When Partners for Rural Impact (PRI), the United Way of the Piedmont, Union County Schools, and the Spartanburg Academic Movement came together to launch Union Uplifted, a cradle-to-career initiative in Union County, SC, making space at the table for all community members was a priority. PRI's role was to convene rural leaders and allies to identify common challenges, share knowledge, and create community by designing and facilitating an outreach strategy that built trust and engaged community members.

PRI makes space at the table using their Community Champions Strategy which builds on residents' lived expertise and a deep knowledge of community relationships. Champions may hold roles with formal authority — such as mayors, council members or school officials — while others are simply respected community members. The goal was to identify more than 30 community champions from across Union County, including towns like Carlisle (pop. 320) and Jonesville (pop. 910) and the even smaller communities like Cross Keys and Fish Dam. The 37 champions who participated



were central to the success of 40 community conversations. Champions reached out to their community networks, then asked, “Who is missing?” to ensure everyone had a seat at the table. They also suggested ways these convenings could be more accessible and welcoming, especially to those in the community who are often underrepresented. As a result, the convenings prioritized creating connections by reaching folks in the places they already gathered: town halls, community centers, schools, churches, parking lots, the former Black hospital, and local businesses. Thanks to the champions' efforts, nearly 700 community members of all ages and backgrounds contributed to the development of a plan to build the systems and programs needed to strengthen pathways to economic mobility. As PRI's Associate Vice President of Implementation & Practice Katie Basham notes, “When community members have a seat at the table and their lived expertise is welcomed and valued, the resulting plan reflects the community's diverse experiences and aspirations and paves the way for lasting success.”

The community continues to work together to develop strategies and metrics that will ensure public accountability. The community champions contribute to this effort by playing key roles on the leadership council and in the collaborative action networks, which are tasked with developing specific strategies. Thanks to this strong foundation, Union Uplifted continues to strengthen local capabilities and expand opportunities for community members to shape the future of their place.



# 02 ANSWER CRITICAL QUESTIONS

*“With data as a flashlight, rather than a hammer, we can illuminate how we are contributing to shifts over time, what we need to adapt and anticipate, and how we invite others in to help us make sense of what’s happening and what needs to happen next.”*

Katie Wehr, Senior Program Officer, McKnight Foundation

Measurement can easily become a bottomless well of need, where we convince ourselves that more data equates to success. But achievement metrics are empty vessels if they don’t add up to an ultimate goal. Plus, measurement can be cumbersome — for both nonprofits and leaders on the ground, with little capacity to meet the myriad requests for information, and for those sifting through the data asking the question, “What do I do with all this?”

Staying focused and having clarity on what you’re trying to achieve is key. Place-based initiatives require nimbleness of measurement, because they must stay plugged into changing community needs; and they necessitate working with community leaders who are laser focused on taking action in their local area. Therefore, it’s smart to align on what you’re measuring, and why, throughout.

The Gates Foundation’s Guide to Actionable Measurement<sup>4</sup> is a useful reference point to keep measurement action-oriented. It encourages us to ask ourselves: “What do you want the metrics to prove out?” Set clear goals for that moment in time and focus on success metrics that will help answer a limited set of questions or make the case you are seeking to prove.

## Put this principle into practice:

- Agree on a clear set of time-bound questions and hypotheses you are trying to prove.
- Make sure your actions and funding align with those enquiries.
- Analyze measurement KPIs to ensure they will actually help answer those questions and/or prove a hypothesis for change.
- Acknowledge the limitations of the data upfront, and be open about what you are and are not measuring (e.g., data on a program’s reach does not necessarily prove positive long-term change).

## *How the McKnight Foundation answers critical questions on how systems shape opportunity in Minnesota*

McKnight Foundation’s Vibrant & Equitable Communities program advances shared prosperity, power, and participation for all Minnesotans by addressing the systems that shape economic opportunity.

*The McKnight Foundation’s work focuses on affordable housing, quality jobs, access to capital and assets, and democratic participation, guided by core questions about how wealth is created, sustained, and distributed — and for whom.*

The Foundation recognizes that wealth inequities are structural and cumulative, rooted in policies, practices, power dynamics, and paradigms rather than individual choices.

The Foundation takes a systems-oriented approach, drawing on frameworks like the Water of Systems Change and targeted universalism, to understand and influence conditions that create equitable outcomes.

The Foundation partners with government, business, nonprofits, lenders, philanthropy, and community organizers to understand and shift structures that shape economic systems. The Foundation tracks progress using population-level indicators including housing cost burden, family-sustaining wages, and household net assets.

Quarterly, the Foundation reviews system signals to assess what is changing and how tactics are contributing to progress.

### Signals to Consider

- How the trust and strength of relationships are changing between government, lenders, and affordable housing providers.
- How public policies and organizational practices are evolving.
- What is helping or hindering worker centers.
- How community finance organizations are strengthening their operating environment and leveraging capital.
- What functions are strengthening (or weakening) when it comes to cooperative ownership.
- How coalition members are developing shared agendas — and what’s getting in their way.

This learning orientation helps identify leverage points, adapt the work, and take wise actions toward a more just and inclusive Minnesota.



# 03 FOLLOW ROOTS AND RIPPLES

*“Measurement became a tool for learning and coherence, not compliance. It functioned as a flashlight, not a hammer.”*

Dr. Russell Booker, CEO, Spartanburg Academic Movement

To be successful, place-based funders must have the appetite to move beyond piecemeal programmatic funding and reporting, and towards a system of measurement that is informed by the history of a place and understands the various factors influencing its future. Leaders in this space must be willing to dig into not only what the issues are today, but what the root causes of those challenges are; while also being sensitive to the potential consequences of their actions.

Humility is key. If you are looking to make sustainable, transformational change within a community, start by understanding the landscape of existing stakeholders. Sometimes the most impact you can make is by joining forces and lending your weight to existing initiatives, like policy change, that lay the groundwork for lasting change. With a clear understanding of the history of philanthropy and community action in your area of focus (understanding what has worked and what hasn't, and why), and an up to date map of the current flow of action, you can leverage your strengths in a thoughtful way that doesn't disrupt progress.

## Put this principle into practice:

- Spend time on the ground understanding the local culture and history (e.g., [NationSwell's Immersive Event in Atlanta](#), in collaboration with the Annie E. Casey Foundation, included a walk around the city led by GirlTrek, and a breakfast panel — “Atlanta's Path in Perspective” — laying bare the complexity of the city's narrative, featuring leaders such as Courtney English, Interim Chief of Staff to Mayor Andre Dickens).
- Connect with other funders and community leaders in your space to learn about their work and their experience in the area (see the [Place-based Action Map](#) to learn more about place-based initiatives across the U.S.).
- Use the [Place-based Community Dial](#) to map your strengths against needs in your region of focus.
- Support existing initiatives that align to your overall goals, before diving in to create new initiatives.
- Create measures of success that address root causes and present day problems.

## *How Spartanburg Academic Movement treats measurement as a living system to drive lasting change*

**Written by Russell Booker, Ph.D., Chief Executive Officer, Spartanburg Academic Movement**

Achieving lasting results in Spartanburg rests on a key asset: our capacity to work in partnership. Over time, community stakeholders have demonstrated what's possible when collaboration is grounded in humility, trust, and shared learning. Cross-sector efforts have contributed to increased economic growth, reduced teen birth rates, and improved academic outcomes.

And yet, we know there is farther to go. Spartanburg County remains in the bottom ten percent of U.S. counties for economic mobility. That reality limits individual opportunity and our collective future.

Movement 2030 is our community's response. It is a shared, place-based agenda catalyzed by philanthropy, aligned around children and families, and designed to improve economic mobility. Our approach begins with a simple conviction: outcomes don't exist in isolation, and neither should the systems that shape them.



Through the Spartanburg Academic Movement and Movement 2030, we have learned that change requires attending the roots of inequity and the ripples created by well-intentioned action.

Grounded in Spartanburg's history, we chose alignment over accumulation. Rather than adding programs to a crowded landscape, partners came together around shared goals and indicators — making measurement a tool for learning and coherence, not compliance. It functioned as a flashlight, not a hammer.

This work required humility. Often, our most impactful move was not to lead, but to support existing efforts. By following roots and ripples, Movement 2030 treats measurement as a living system, evolving with the community — yielding better data, stronger trust, honest feedback, clearer priorities, and a shared roadmap from cradle to career.

*Spartanburg Academic Movement is a member of the StriveTogether Cradle to Career Network of place-based partnerships.*

# 04 START SMALL AND BUILD UP

*“The people who live there can feel the cumulative effects in their lifetimes, with direct implications for life expectancy gaps.”*

Luisa Krug, Executive Director, Tulsa Global District

Place-based work — and the measurement approach — requires a willingness to start small in order to achieve big impact. This means nurturing new ideas that emerge from the community — a soccer program for local kids; a small retail center on the outskirts of town — alongside bigger, splashier initiatives. Ideally, small localized pilots will make the case for scale (e.g., UPS funded one childcare pilot at one manufacturing plant and analyzed its ROI; that research led to scaling childcare across the country<sup>5</sup>).

Sometimes it will require getting hyperlocal, and working with one specific ZIP code: like KPMG has done in Orlando, with their 32805 initiative, close to their U.S. headquarters. Within the 32805 ZIP code, KPMG works with a collection of community partners to build connection and capacity between the community groups who are living and working alongside one another.

This is in some ways antithetical to the traditional “peanut butter” approach to philanthropy of old, where foundations announce a sum of money that they spread thin across a swath of communities. Business leaders who are programmed to see volume as the only measure of real success will need to be brought along to understand that there is often a deeper level of impact made by focusing on a smaller group to go deep and have lasting impact over decades and generations. Patience pays off.

By testing what works, starting small and investing in their evolution, the cumulative wins will add up to life-changing gains for the whole community; and lay the groundwork for scalable solutions.

## Put this principle into practice:

- Consider upfront how your nascent or nurtured initiatives can make the case to scale over time, unlocking further private and public funding for lasting change.
- Anchor this patient approach in a framework over overarching goals that you are tracking for your community (e.g., life expectancy; kindergarten reading readiness, etc.) to avoid fragmentation into a confusing array of conflicting KPIs.
- Create the infrastructure for small, nimble grantmaking that can allow smaller initiatives to evolve and grow.
- Offer support and capacity building to community leaders and small operations to set up data tracking that aligns with your overall measurement framework (consider creating ‘Community of Practice’ where local leaders can attend guidance seminars / sessions and share learnings).

## *How Learn to Earn Dayton coordinates measurement to increase success*

The team started work in early education. Through the data they collected, they were able to spin out a full Preschool Promise initiative offering high-quality learning and well-being opportunities that increase kindergarten readiness. It grew from small local pilots and now reaches over 120 partner sites.

Managing Director, Kelly Geers, reflects on the power of even basic data to change behavior:

“In talking to educators, they all knew their high school graduation rates. But when we showed them post-secondary enrollment and persistence data dropping off, they were shocked. It helped them think about not just getting kids across the finish line, but preparing them for the future, which opened up doors to all of our career navigation and pathway work.”



The Learn to Earn team is part of a local collaborative that created a framework with consistent measures of educational success, family health and wellness, financial stability, and thriving neighborhoods — choosing metrics that were universal enough that multiple organizations could report on them; the county government used that framework to align their levy funds for opportunity development.

Emma Smales, the Director of Data & Impact, is already seeing impact from this shared data: “The county has noticed that applications coming in are much more thoughtful about making it a holistic, whole-family program instead of just one isolated program. It’s pushing organizations to think through how they can achieve results for the whole family.”

*Learn to Earn Dayton, OH, is a part of the StriveTogether Cradle to Career Network.*



# 05 EMBRACE PROGRESS OVER PERFECTION

*“We don’t have all the answers, but the fear of getting things wrong can’t stop us from trying to get things right in the end.”*

Yvon Chouinard, Founder, Patagonia, [Work in Progress 2025 Impact Report](#)

There is value in tracking the same things over time so we can tell a transparent story of change. And teams are often strapped for time and resources, making it challenging to undo frameworks and start afresh. However, measurement is not something that should be kept in a locked box. Needs will evolve and new challenges will emerge on a micro and macro level. The most authentic way to keep track of whether you are having a real impact: check in on progress and evolve your measurement to meet the current moment.

A key way to enable your own nimbleness is to open up community feedback loops and be transparent on what has worked, and what hasn’t. This allows funders to keep an ear to the ground on real life impact, and to better understand whether your approach to measurement is capturing the change you intended to make (and that the community needs). Plus, more regular community input makes your data richer and more human.

Feedback moments, whether they are in person, ad hoc, or organized via survey, allow you to take the pulse on key qualitative indicators — e.g., a sense of belonging in a community, or how much they are connecting socially — that give you greater opportunity to understand if your place-based work is truly in touch with the community and people’s everyday lives.

I appreciate that it may seem like we have come full circle from principle one in this guide... but that is kind of the point. Don’t engage the community once then go away and do your thing. In the spirit of growth, we must be brave enough to embrace feedback, acknowledge where we have fallen short, and move forward with updated viewpoints.

## Put this principle into practice:

- Set expectations internally and externally that there will be regular opportunities for feedback and re-evaluation of measurement frameworks.
- Create the channels for the community leaders you work with to safely and securely provide feedback (e.g., you may consider anonymous surveys, personal check ins with trusted program officers, or larger facilitated workshops with community members).
- Communicate transparently about what’s working and what’s not to build trust (if you keep your measurement approach / framework / criteria opaque, you risk losing trust with the community and devaluing the impact of your results and storytelling).

## *How Coalfield Development iterates with the community to build trust*

Written by Jacob Israel Hannah,  
CEO, Coalfield Development

Imagine you have the task to “make life better” in Appalachia. Generationally expounding issues are worsening over time and require billions of investment dollars to address. So, where do you start? At Coalfield Development, we embrace progress over perfection, start with what you have, and leverage the needs of one sector towards the benefit of another. At Coalfield, we categorize that into three focuses. Addressing one empowers the other in a flywheel effect.

### Three Areas of Focus

---

- **People:** While no single employer can hire every person looking for jobs in the coalfields of West Virginia, we can train and employ a catalytic cluster of community members to address the dilapidated places around them.
- **Places:** Revitalizing 800,000 acres of abandoned coal mine sites in Appalachia is an impossible task. However, we can focus the trained skills of our community to transform their local assets.
- **Prosperity:** While we cannot redirect the billions of dollars that left Appalachia back to the community, we can combine the skilled people and the revitalized places to create the market conditions to incubate employment-based social enterprises that perpetuate new markets, dollars, and jobs.



Before you know it, you’ve begun to rebuild a society. It’s not perfect — it’s decentralized, human-based, scrappy, and relies on iteration at the hyper-local level with trust. Instead of waiting for the perfect opportunity or resource, we engage in the process of rebuilding our own destiny together.

It takes time, but that investment generates roots that sustain the work, rebuild hope, and match the pace of self-actualization for the community.



# 06 LOOK TO THE FUTURE

*“We are creating the conditions for sustainable change, not just funding a program.”*

**Alison Mathias, Former Head of Corporate & Foundation Giving, MassMutual Foundation;  
Former VP of MassMutual Foundation**

Place-based work is localized and ambitious. Generational change in a community — closing the wealth gap, opening up life changing opportunities — is the ultimate goal. Obviously, most funders are not in a position to make a lifetime funding commitment. However, every place-based funder can and should be planning for and measuring success in a way that can catalyze or lay the foundation for longer term change.

As you build your measurement framework, consider how you can use data to unlock follow-on capital. Identify, with the community, what workstreams, infrastructure, and programs need to be built in order to take their work to the next level with partners who are embedded in the area (e.g., local government, industry, other philanthropists, private funders). Use your time on the ground to build relationships with that network of local public and private leaders, to better understand how the work can live on beyond your investment. Philanthropic funding is the best risk capital a community can access — so make sure that your measurement system is effectively lowering the risk and the barriers to ongoing support from others.

## Put this principle into practice:

- Name success as stability, not dependency.
- Set clear expectations with the community early about expected timing of support and future-planning support.
- Design evaluation to answer funder, policymaker, and employer questions.
- Package results into clear ROI, cost-avoidance, and human impact narratives.
- Actively socialize findings with public agencies, corporate partners, and aligned philanthropies to unlock capital at scale.

## *How ImpactTulsa uses data to build nested civic infrastructure*



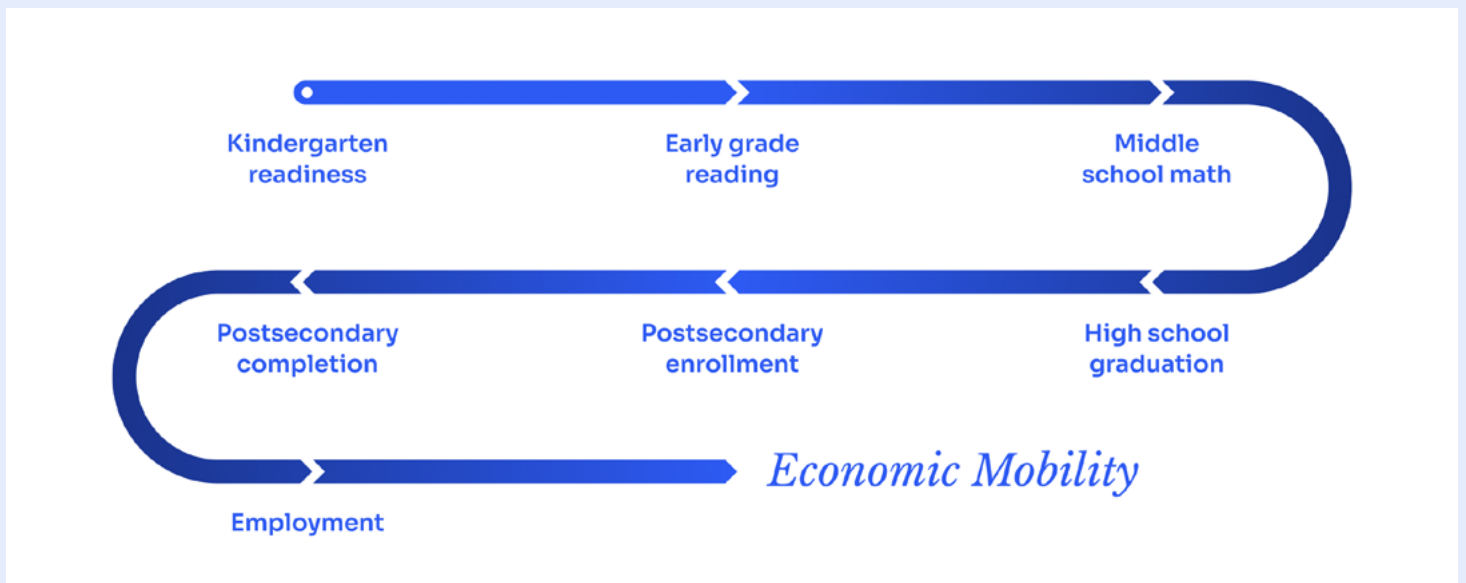
ImpactTulsa is a member of the StriveTogether Cradle to Career Network, using the seven key milestones as their framework for economic mobility and population-level measurement. Plus, they have innovated a localized approach to measurement that examines how adjacent sectors impact education & opportunity.

The data opened the door to where policy change is needed. “We are very serious with data here because we are trying to show the evidence of why decision-makers and policymakers should do things differently,” says Dr Kimbrel.

Dr. Delia Kimbrel, ImpactTulsa’s Head of Research and Data Strategy, says: “We created the Child Equity Index with TPS, our advanced analytics model that statistically predicts how poverty, evictions, lack of transportation and safety challenges impact cradle-to-career outcomes. We used Raj Chetty’s evidence-based research on how ZIP codes impact economic mobility, and applied that to outcomes for children. That was profound for our community — an aha moment for adjacent sectors to education to share in the responsibility. For example, we saw a tight correlation between home evictions and absenteeism.”

Now, Tulsa Mayor Nichols has adopted our cradle-to-career, economic mobility strategy, creating a shared framework for the new Mayor’s Office of Children, Youth and Families to mobilize funding, practice, and policy change to ensure Tulsa City and the community more broadly are working toward shared priorities that advance youth outcomes.

ImpactTulsa’s work is an inspiring example of the early creation of a nested civic infrastructure approach: using data to drive local systems change that focuses on kids and families, and then expanding that out from neighborhood to city to region to state.



# THANK YOU FOR TAKING THE PRINCIPLED APPROACH



This toolkit was created by the NationSwell Place-based Collaborative of partners:

*Annie E. Casey Foundation*  
*BlackRock Foundation*  
*Cisco*  
*George Kaiser Family Foundation*  
*Google Data Centers*  
*KPMG U.S. Foundation*  
*MassMutual Foundation*  
*Partners for Rural Impact*  
*ServiceNow*  
*Starbucks*  
*Tony Pipa of Brookings Institution*

Special thanks to all the experts and leaders who contributed and are putting a principled approach to place-based measurement into action across the U.S., including:

*The Center for Trust and Transformation*  
*Blue Meridian*  
*Spartanburg Academic Movement*  
*Partners for Rural Impact*  
*Coalfield Development*  
*ImpactTulsa*  
*Learn to Earn Dayton*  
*Living Cities*  
*StriveTogether*  
*Tulsa Global District*  
*MassMutual Foundation*  
*McKnight Foundation*

For more information on place-based impact and the work of the Collaborative, please reach out to NationSwell at [nationswell.com/collaboratives-inquiry](https://nationswell.com/collaboratives-inquiry)

# EXAMPLES OF PRINCIPLED MEASUREMENT IN PRACTICE

We can learn a lot from the organizations who have been putting place-based impact into action in communities across the U.S. In this Appendix, you will find details of how some of the leading cradle to career and/or place-based funders and organizers put the principles from this toolkit into action. Included:

<p><i>StriveTogether</i></p>	<p>A member collaborative committed to closing income and wealth gaps</p> <p>↓</p>	
<p>↗</p> <p>A national network of place-based partnerships</p>		<p><i>Living Cities</i></p>
<p><i>Blue Meridian — Place Matters</i></p>	<p>An investment portfolio focused on economic and social mobility</p> <p>←</p>	

# STRIVETOGETHER

*“When communities share a vision for success and measure what matters, they can drive real change. StriveTogether brings partners together to turn data into action so more young people can succeed and communities can thrive.”*

Jennifer Blatz, President and CEO, StriveTogether



## Key Measures of Success

StriveTogether communities track progress on seven population-level outcomes:

1. Kindergarten readiness
2. Early grade reading
3. Middle grade math
4. High school graduation
5. Postsecondary enrollment
6. Postsecondary completion
7. Employment

To support communities to improve these outcomes, StriveTogether has created resources for each of the seven outcomes: data guides and playbooks, [all accessible here](#). The **outcomes data guides** offer data collection strategies, data sources and methods for building strong data practices around each outcome. The **outcomes playbooks** are comprehensive guides to the latest research and best practices on each outcome. Communities use the playbooks to identify local needs, prioritize areas for collective action and design tailored strategies.

## Mission Statement

StriveTogether is a national network of place-based partnerships that bring together neighbors, including youth and families, nonprofits, employers, schools and more to work toward a future where youth can thrive in their communities.



## Approach to Impact

The StriveTogether Theory of Action™ is a proven framework for creating lasting change in communities and putting more young people on a path to economic mobility. It provides progressive milestones rather than a prescription for change, allowing local context to guide progress.

Using the Theory of Action, StriveTogether Cradle to Career Network members improve the cradle-to-career outcomes that research shows lead to economic mobility. Each year, StriveTogether supports network communities to measure their progress on these outcome areas through the Civic Infrastructure Assessment. Through the assessment, StriveTogether learns what strategies get results and gains a nationwide view of the data that matters most to the success of young people.

# LIVING CITIES



## Mission Statement

We are a member collaborative of leading philanthropic foundations and financial institutions committed to closing income and wealth gaps in the United States and building an economy that works for everyone.

## Approach to Impact

Living Cities advances inclusive capital in key wealth-building pathways. We are committed to the economic security of all people in U.S. cities by undoing systemic barriers that widen income and wealth gaps and prevent the creation of a truly inclusive economy. Through inclusive approaches and a results focus, we hold ourselves accountable to this commitment and are intentionally self-reflective as we work to continuously improve.

In 2007, Living Cities expanded its focus from neighborhood-level transformation to broader economic systems that shape opportunity in cities. Since then, the organization has evolved toward aligning capital and institutional leaders to close income and wealth gaps and build durable pathways to ownership and economic mobility.

## Key Measures of Success

Living Cities seeks to shift the flow of capital so all people can build wealth through home and business ownership, investment, and other pathways.

To do this, **we identify where there are barriers to financial inclusion and test new approaches to equitable capital access** — with local governments and communities, through impact investing, and through the efforts of the foundations and financial institutions who are Living Cities members.

*“We measure success by whether capital flows differently. That means more people building wealth through ownership, stronger local investment ecosystems, and institutions aligning their practices around equitable access to capital. Our role is to test what works with cities and our members and scale approaches that expand durable wealth-building opportunities.”*

Myung J. Lee, Chief Strategy Officer, Living Cities

# BLUE MERIDIAN — PLACE MATTERS

*“Place-based change starts with the people who know their community best. Our approach is to support local partnerships, strengthen the enabling infrastructure around them, and use our investment to unlock additional public and private funding.”*

Allana Jackson, Managing Director, Blue Meridian



blue meridian  
partners

## Mission Statement

Blue Meridian Partners’ Place Matters portfolio aims to improve economic and social mobility in communities across the U.S. by investing in place-based partnerships, as well as the ecosystem and infrastructure needed to sustain their success.

## Approach to Impact

The Place Matters portfolio reflects Blue Meridian’s driving belief in the power of community: investing in cross-sector local leaders, identifying shared goals, and creating interventions specific to their needs can break the link between geography and destiny.

The Place Matters strategy is anchored on three levers:

- Accelerating the ability of place-based partnerships to achieve population-level cradle-to-career outcomes through replicable methodology and significant investment;
- Strengthening catalytic supports and context for place-based partnerships to overcome common challenges, move more quickly, and succeed at scale;
- Leveraging investments to unlock new public and private funding that will sustain place-based work over the long-term.

## Key Measures of Success

Place Matters investees work with the Blue Meridian team to co-create custom performance milestones on their path to scale. These milestones, which reflect local context and goals over the investment term, are related to: key outcomes across life stages from cradle-to-career; market penetration; financial sustainability; and organizational health.

In addition to performance measurement, Blue Meridian reports on investment impact, using predictive analytics to document how capital is materially influencing both near-term improvements for people and communities as well as longer-term systems change and capital alignment.



# PLACE-BASED IMPACT IN PRACTICE

Visit the Place-based Impact  
Funder Guide to learn more.

[placebasedimpact.nationswell.com](https://placebasedimpact.nationswell.com)

