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## CASE STUDY

### Lakes Community Foundation: defining community wellbeing

#### Background

The city of Lakes is a thriving community of 40,000 people. The town serves as the regional hub of the southeast corner of the province, offering amenities and services to an additional 30,000 people living in the outlying regions. Although the industry of Lakes is driven by the local agriculture and fishing industries, the town is also home to several industry-related manufacturing plants. The community is proud of its local athletic teams and its vibrant arts and cultural activities offered throughout the year.

The Lakes Community Foundation (LCF) was established in 1981 by a small group of local business owners who wanted to maintain their community so that their children, grandchildren, and future generations would be proud to call Lakes their home. The Foundation has enjoyed steady growth and is working to become a household name throughout the community. Through the support of several high-profile projects, such as shelter for an outdoor rink, a van for Meals on Wheels, and a new playground for the elementary school, the LCF has enjoyed some publicity. Granting almost \$400,000 each year to local registered charities, the Foundation supports various projects, both big and small.

The LCF's vision is "A community where life flourishes, for all" achieved through its mission statement "Together, building a vibrant community." The Foundation is led by a 10-member volunteer board supported by a full-time executive director (Lisa). The board comprises passionate community members who represent various areas of the community, both in terms of services (i.e., childcare, recreation, arts, business) and geography (i.e., town members and rural members).

The board is led by chair Tom, who is entering his fourth year with the board. It has been five years since the Foundation's last strategic planning exercise. With recent and significant change in the community and the board, Tom requests the Foundation start this new year with several ½ day strategic conversations focused on the future of LCF.

Through these conversations, Tom hopes to generate a process to build a five-year strategic plan for the Foundation. Tom wants to present the board a single question for the first conversation: "How does the LCF define success?" Tom believes alignment by the board in their answer to this question will enable the Foundation to move forward in creating the greatest impact for the Lakes community.

#### Strategic Conversation – How does the LCF define its success?

Tom starts the first meeting by asking each board member to write down what they think defines the LCF as a community foundation without talking to each other. He challenges the group to take a moment to reflect and to look past the name itself. What makes LCF unique and special amongst all the registered charities operating in Lakes? Tom's goal is to get a sense of how aligned the board is on this fundamental question. He notes a



couple of members are quick to write a response and then turn to their phones to scroll online, but others have much more to write. Curious to hear the board's thoughts, he opens it up to the group to share what they have written down. Everyone has endowments, donors, and grants noted as core to what makes them a community foundation, but a couple board members share: trust, connection, and impact.

Tom is excited; this is a perfect starting place for the day. "Thank you everyone for your open and honest responses. Let's now dive into the main question I want to explore today: How does the LCF define success?" Tom breaks the board up into three smaller groups to generate more conversation around the room. Given only 20 minutes, each group is asked to produce an answer to the question posed.

After 20 minutes Tom brings the group back together. "Thank you everyone for your passion and enthusiasm in answering this question. I moved throughout the room and can say, as a group, we have much to unpack. Can someone share their experience answering this question?"

John, a traditionally quiet board member, is quick to raise his hand. "Well, I do have something to share. To be honest Tom, I was skeptical about this. A whole meeting, to talk about how we define success? I thought that was, quite frankly, a waste of our time. In my head, that is a simple question to answer. From the day I joined this board, each year, we grant a little bit more money to the community. And each year we see a couple of new names on our donor wall. To me, that very clearly defined success. But Michelle here, she challenged me on that definition, and I now see we do, as a board, have a lot to talk about."

"Thanks, John, for being honest and thanks for being open to expanding this conversation," Tom says. "Anyone else have similar reactions to share?"

"I had a similar experience to John," says Devan, a local high school teacher. "I thought I knew the answer as my mind immediately went to our mission, which says 'a vibrant community.' So, to me, our vibrant community showcased and defined our success. But Paul here, who works in research, pointed out we must consider how and who gets to define what goes into the wellbeing of our vibrant community. And this really made me pause and think. Do we, all sitting here today, get to define what makes up the wellbeing of Lakes?"

And from there, the ½ day conversation flies by. Adam, a long-standing board member and part of the local credit union leadership team, takes the conversation in a different direction when he invites the group to think about the Foundation's role in the community. He asks, "Is this really our job, to be having these conversations? Aren't we simply an institution that flows gifts from generous donors back into the community? I thought we played a quiet background supporting role, and that it's not our place to get entangled in defining community wellbeing priorities." Although the group decided that yes, it is the Foundation's job to take on a leadership role within the community, Adam's questions spark an interesting conversation around how to lead while keeping the community's interests front and center.

Tom wraps up the meeting with a request. "We have ended with more questions than we have started with. A sign of rich and progressive conversation! Before our next meeting, please reflect on what makes up the



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wellbeing of the vibrant Lakes community, and how LCF can ensure its approach to wellbeing is inclusive and representative of the entire Lakes community.”

### **A Comprehensive Framework and Commitment to Community**

Tom looks forward to unpacking these two critical questions in the next strategic conversation. He is confident that bringing clarity around how the Foundation and community collectively define community wellbeing will influence the board’s leadership. He is excited to think about the impact the Foundation could make with this collective understanding and appreciation of its leadership role.

At the strategic conversation, armed with a marker and a whiteboard, Tom asks, “So, what goes into the wellbeing of our vibrant community here in Lakes?” The responses come fast and furious, ranging from “affordable places to go for fun,” “action towards protecting our environment,” and “accessible health care that takes care of my physical and mental wellbeing” to “a feeling of safety,” “a good turnout at election time,” and “a healthy balance between work and play, so I can enjoy my community!”

After a little more time cleaning up and completing the list, the group agrees on what they think is a comprehensive list of the key elements of community wellbeing. The list clearly connects daily life with the concept of quality community life.

Tom then asks the group, “Ok, this is fantastic, I can already start to see how we can more clearly define our Foundation’s success, but how do we ensure this definition is reflective and inclusive of all Lakes community members?”

“Tom, I would like to share something that has surprised me,” says Michelle. “Today we didn’t sit and talk about all the problems of Lakes. We spoke about what an ideal Lakes community would look like. I find that exciting! Lakes is full of leaders, volunteers, resources, expertise, and passion that can work together to realize this ideal. As a Foundation, we need to keep in mind that our grants don’t go to fixing a problem, they go to supporting and empowering Lakes community members in building their ideal community. LCF’s grants and all that we have said goes into building a vibrant community are all connected; nothing we do as a Foundation or a community stands alone. For me, this is a small shift in how I will approach our future work. But I think it’s a shift that will support greater engagement, buy-in, support, and trust between the community and the Foundation’s work.”

“Great point Michelle,” Paul says. “Building on your comment and what Devan talked about at our last meeting, we need to question how we define and approach our work. But this board can’t do it alone. We need to get out and engage the community more. I appreciate we are all busy, and each meeting’s agenda is always full, but this conversation has revealed the importance of connecting with and listening to the community we serve. We do a wonderful job of sharing our granting results and thanking our donors, but the communication needs to be two-way.”



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Tom ends the meeting by thanking everyone for their participation. He is proud to serve alongside such passionate and caring community leaders. He had worried some would take these conversations as questioning the great work the Foundation does, but was relieved that no one questioned the significant impact the Foundation has made, and continues to make, in the community. He is thrilled to think about the future, and how the Foundation can enhance its work. "Take care everyone – next meeting, we will add the idea of hosting a townhall to our agenda. I look forward to the conversation."

### **Discussion Questions**

1. What are the ways Lakes Community Foundation can enhance its community impact?
2. What limits Lakes Community Foundation's community impact?