



The Community Ecocycle in Place-Based Systems Change: A Tool for Funder and Community Reflection and Action

This tool is one item in a suite of materials produced for the P-16 Community Investment initiative, a three-year learning engagement funded by the Bill & Melinda Gates Foundation across five communities (Buffalo, New York; Chattanooga, Tennessee; Dallas, Texas; the Rio Grande Valley, Texas; and Tacoma, Washington). The initiative seeks to understand and support the development of coherent, high-functioning, equity-centered, place-based systems that span all education sectors from cradle to career. Funders, practitioners, and other stakeholders interested in place-based systems change can use this tool in their work. It was developed by a team from Mathematica and Equal Measure, in collaboration with the foundation and its partners in the participating communities. Mathematica and Equal Measure serve as learning and evaluation partners in this effort.

Key terms used in this tool



Community: the place that is the locus of a systems change effort and the population in that place, which a collective effort or initiative is seeking to serve



Partnership: a place-based, multi-stakeholder effort or initiative working to improve outcomes in a community



Place-based: geographically specific, as defined by the partnership; the unit may be a neighborhood, a city or town, or a state or region, depending on the partnership



Systems change: shifting the conditions—including structures, practices, policies, resource flows, power dynamics, and mindsets—that produce societal problems and hold them in place; typically involves cross-sector collaboration among stakeholders from public, nonprofit, philanthropic, or private institutions, as well as community constituents



Co-design: a collaborative process in which local stakeholders play a leading role in engaging and consulting with funders and other partners to design solutions to problems that local stakeholders have identified and prioritized

Introduction

Given the complexity of social change efforts in an increasingly urgent social justice and geopolitical moment, the question is no longer *whether* funders should be investing in systems change, but rather *how*. This tool is intended to help funders¹ who have elected to invest in place-based systems change in two key ways. First, funders can use this tool to consider the dynamic, natural, and necessary developmental phases through which communities move. Second, the tool can help funders engage with communities to co-design investment approaches that better match communities' current and future assets and needs based on their developmental phase. Our hope is that by using this tool, funders can work collaboratively with communities to understand community conditions and to offer investment approaches that promote self-determination and community ownership of lasting solutions.

Funders using this tool to co-design place-based systems change efforts that center community priorities, capacity, and context should note that this tool is grounded in a common set of principles:

- 1. Co-design is essential for impact and sets the stage for funders to work effectively with community leaders, constituents, local organizations, and stakeholders.** Although internal conversation and planning within foundations are often necessary, the deliberate embrace of co-design, from ideation, to understanding community assets and needs, to implementation, to assessment, is an essential ingredient and disposition.
- 2. Effective investments in place-based systems change require funders to be accountable, transparent, and vulnerable with the community they seek to support.** The power dynamic between funders and community members is real, and in some ways, unavoidable. When funders openly acknowledge this dynamic and model transparency and accountability among themselves—not just for those receiving funding—funders can create the conditions for true partnership, where investments can make an impact.
- 3. Funders must have clarity about their own organizational willingness, capacity, and culture before they can invest effectively in place-based systems change.**² We recognize that each foundation is unique in its approach to grantmaking and impact and that almost all philanthropic funding comes with some strings attached.

To invest effectively in communities, funders must know their own priorities and limitations well and work with communities to find areas of mutual interest so these “strings” do not overshadow real community needs.

- 4. Effective place-based investment requires flexible and tailored approaches.** Finally, although it is common to acknowledge that all communities are different, the funder playbook is often somewhat limited or inflexible, whether in terms of eligibility criteria, preferences for certain types of organizations over others, or grantmaking processes including grant terms, cycles, and reporting requirements. Effective investments work within and beyond standard grantmaking processes in ways that meet unique community needs.

The ecocycle model and place-based systems change

Through our work with the Bill & Melinda Gates Foundation and other place-based funders, we have documented that communities³ naturally and continuously cycle through different developmental phases. To better understand these phases, we draw from FSG's *Guide to Ecocycle Mapping*⁴ and the language of ecological systems to describe unique, developmental phases of an organization, program, or initiative. We believe that the ecological systems model is equally helpful in thinking about phases of place-based, community-led systems change efforts.

For this tool, we have built upon the ecocycle model in Exhibit 1 to help funders in partnership with community leaders in three key ways: (1) understanding the ecocycle model and its phases, (2) recognizing community conditions from an ecocycle perspective, and (3) identifying and co-designing effective investments in alignment with community needs.

Exhibit 1. Community ecocycle model

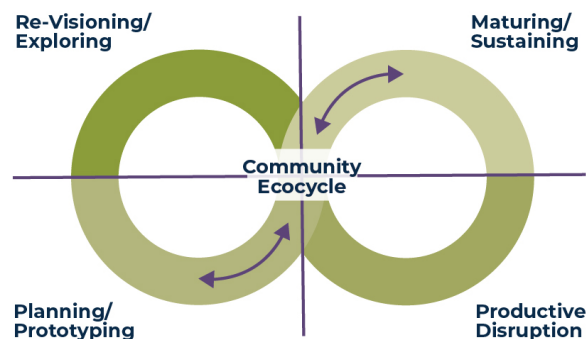


Exhibit 2. Ecocycle phases

Exhibit 2 provides a high-level description of each ecocycle phase from [Exhibit 1](#), along with an illustrative scenario.

Phase	Description and example of phase
Planning/ Prototyping	<p>The Planning/Prototyping phase involves generating or creating ideas and is a prime period for experimentation.</p> <p>In communities, this phase emphasizes designing and piloting a variety of programs, strategies, or initiatives. The goal during this phase is to cast a wide net of possible community solutions, letting some take root and thrive while others are naturally rejected by the community and context.</p> <p>Example: Imagine a community that has just seen an influx of immigrants welcomed into the United States through a national policy to provide political refuge from a war-torn nation—something that has happened often in U.S. history. To address this policy, there is an increase in resettlement programs that offer supports such as finding and providing housing, workforce preparation, English language learner supports, classes on American culture and norms, and so on. Community-based organizations are born or pivot to address the emerging community needs during a transitional time, possibly working with local government or public agencies, to generate a variety of programs in place.</p>
Maturing/ Sustaining	<p>The Maturing/Sustaining phase represents relative stability, where programmatic efforts often generate impact and demonstrate success after being in place for some time. As a result, communities sometimes strive to achieve this phase as an end goal and aim to remain in this state as long as possible. As appealing as this phase may seem, however, it is normal—and potentially generative—for a community to move out of it.</p> <p>Example: Imagine the same resettlement community example, 10 years later. By now, families have a second generation of children born in the United States. Households may be dual-language; small, privately owned businesses are springing up; and a core set of programs have stabilized to support continuing community needs, such as workforce development and education grants.</p>
Productive Disruption	<p>In the Productive Disruption phase, investments begin to lose effectiveness or produce diminishing outcomes as the context changes or existing efforts become less aligned to emerging community needs. Efforts are often dissolved or updated to meet new and changing community needs.</p> <p>Example: Continuing with the resettlement community example, some legacy programs that help refugees find housing may still be running 15 years later. What originally started as a response to an acute resettlement need has remained in the community, even though all originally settled families were placed in homes within the first few years. English language learner programs designed for the first immigrant generation resettling in the community remain, even though families now have children born in the United States and learning English in schools. Organizations and other stakeholders begin to dissolve or pivot existing programs to be more relevant for the changing community.</p>
Re-Visioning/ Exploring	<p>The Re-Visioning/Exploring phase often functions as a reset button during which a community reassesses what is needed, takes stock of new assets and resources, looks for “fertile ground,” or begins to pilot test new approaches. This phase can serve as time for ideation.</p> <p>Example: Our refugee community may be voicing its own changing needs after 15 to 20 years in their neighborhoods. Maybe cultural programs that were originally started to support integration into American society now need to pivot to support cultural preservation for coming generations. Stakeholders, community leaders, and local government all work together to assess existing programs and retire or pivot as needed. New community-centered strategies are co-designed with community members, and a flurry of programmatic activity may center on evaluation and decision making around legacy programs, available resources, and preparations for a new cycle of planning and prototyping.</p>

It is important to note that as a model, the ecocycle does not express the full complexity, dynamism, and adaptability continuously at play in communities.⁵ In the context of place-based systems change efforts, we know that communities continually move through and exist within the different phases of the ecocycle. Communities can move back and forth between phases and may even inhabit multiple phases at once. Although there is no set duration or ideal time frame for a community to be in a given phase, communities will naturally cycle through these phases over time in response to or as a result of a variety of factors (some of which we present in this tool), including broader historical, political, and social context.

We also posit that different types of investments are better suited for some phases over others and that philanthropic investments can catalyze, bolster, or accelerate transitions between phases.

How can this tool help me?

This tool is designed as an introductory reflection activity for you as a funder—operating within the context of a larger foundation—to sharpen your understanding of a community’s current ecocycle phase and to do so in partnership with community partners.

This reflection should draw on your knowledge of the community and identify gaps in your understanding; *both are important*. Guidance for next steps follows the tool, **with an emphasis on the importance of funders and community partners reflecting together** to recognize and come to consensus on key community conditions and needs.

As you use this tool, please keep the following in mind:

- ✓ **This tool is not intended to indicate a judgment** whether one phase in the ecocycle is better than another. Although terms like “exploring,” “maturing,” or “disruption” may suggest a relative value, they are not intended to assess the quality of community conditions. All phases are equally important in a healthy community ecocycle.
- ✓ **Judgment and interpretation are expected and required for the tool.** The tool should elevate insights and patterns, as well as raise questions that will necessitate further exploration, research, and conversation with community partners.

- ✓ This tool is very much a **work in progress**. We offer this reflection tool as a so-called 1.0 version. Our hope is that the tool will continue to evolve with additional insights and expertise from users.

Determining the community’s current ecocycle phase and identifying appropriate investment approaches

Format of the tool

This reflection tool consists of two worksheets. The first worksheet, **Determining the Community Ecocycle Phase**, will help you and your community partners consider extant conditions to determine the community’s current, predominant ecocycle phase.

The second worksheet, **Aligning Philanthropic Investments to Community Ecocycle Phase**, will help you and your community partners identify sample philanthropic investments that might be most appropriate for the community’s current, predominant ecocycle phase.

Both worksheets include a set of instructions, a table with content relevant to the task, and a series of reflection questions with space for user notes.

Taken together, the worksheets will help crystallize a shared understanding of the current community ecocycle phase and then provide direction to consider the types of philanthropic investments and engagement approaches that might be most helpful.

Worksheet I: Determining the Community Ecocycle Phase

This worksheet is organized into three domains that we have identified as important in place-based systems change efforts:



Organizational strategies and practices:

The organizational services, supports, and practices involved in the place-based change agenda. These may include the ways in which organizations seek to change, respond to, or shape public policies.



System infrastructure:

The community partnership's capacity and the organizational structures and processes necessary for shared work.



Guiding principles:

The fundamental assumptions about how change is expected to happen. They reflect the partnership's shared values and beliefs about how to solve an important community agenda.



What about the community context?


Context is essential for understanding communities and designing place-based investment strategies. Yet context is often outside the direct sphere of influence or control of community partnerships, stakeholders, and funders. For this reason, we have chosen not to include a fourth domain of context in this tool. However, we absolutely acknowledge that context—defined as macro-level factors such as external state, local, or national policies; sociocultural dynamics; community history; demographic shifts; natural or human disasters; social or civil unrest; or other unique situations—can have enormous implications for place-based change strategies.

Instructions

1. In [Table 1](#) below, carefully read the descriptions of community conditions for each domain. The descriptions are not exhaustive, but rather are intended to help you recognize a community's ecocycle phase. Decide which of the descriptions best corresponds to your understanding of what is happening in the community.
2. Circle the descriptors that best reflect your understanding of the current state of the community. You might circle the entire description, or you might circle examples across the rows and columns that most closely describe current community conditions. Look for the description that, in the balance, best reflects your understanding of the community's conditions to identify the predominant ecocycle phase for that domain. You will refer to this in the next table.
3. Respond to the [reflection questions](#). These questions will prompt you to consider evidence, questions, and next steps to further improve your understanding of the current community ecocycle phase.

Table 1: Community conditions by ecocycle phase

Domain	Ecocycle phase			
	Planning/Prototyping	Maturing/Sustaining	Productive Disruption	Re-Visioning/Exploring
 <p>Organizational strategies and practices: Programs and policies</p>	<ul style="list-style-type: none"> • Proliferation of new pilot programs • Advocacy for new policies and regulations • Intentional collection or assessment of early evidence to provide future programmatic direction • Targeted efforts to understand or expand impact for specific populations 	<ul style="list-style-type: none"> • Stable programs and programmatic activities • Advocacy for continued or increased funding for current programmatic efforts • Exploration of opportunities to expand or scale existing programs • Focus on continuous improvement 	<ul style="list-style-type: none"> • Rise of acute concerns or disagreement between community leadership about programmatic needs • Stakeholder dissatisfaction with activities or outcomes • Sudden shifts in funding disrupting programs and policies • Rise of emergent and competing programmatic priorities 	<ul style="list-style-type: none"> • New or newly motivated organizational efforts to identify programmatic or policy solutions to emerging needs • Increase in community forums and discussions to identify programmatic or policy solutions • Appetite for new directions • Increase in experimentation • Existence of numerous possible approaches or priorities within an issue
 <p>System infrastructure: Partnership capacity</p>	<ul style="list-style-type: none"> • New or renewed and shared vision between organizational partners • New commitments of funds or staff for effort • Action-planning activities with focus on creating shared goals and structures and processes for coordination • New partnerships across the community • Exploration of shared indicators for measurable success and equitable impact 	<ul style="list-style-type: none"> • Relative stasis of community change efforts; sustained community change agendas • Strong, stable cross-sector collaboration with low partner turnover • Clear and sustained roles and organizational responsibilities • Strong accountability and coordinated implementation across partners • Relatively stable funding for partnership coordination and participation 	<ul style="list-style-type: none"> • Planned or sudden changes in organizational staff and leadership or capacity • Significant financial shifts that lead to destabilization • Ending period for community-wide strategic plan or funding • Shifts in priority goals or desired outcomes due to acute community needs • Institutional or organizational closings, mergers, or acquisitions 	<ul style="list-style-type: none"> • Nascent partnerships, but often siloed organizations • New organizations become active or involved • Rising community leadership; new or renewed energy around an issue among potential partners • Increase in organizational strategic planning • Desire to seek additional funds to support new directions

Domain	Ecocycle phase			
	Planning/Prototyping	Maturing/Sustaining	Productive Disruption	Re-Visioning/Exploring
 <p>Guiding principles: Relationships and power dynamics</p>	<ul style="list-style-type: none"> • Focus on cultivating trust and buy-in • Increased exploration of individual organizations identifying alignment to collective action • Emerging accountability between partners and with community • Increased focus on community and constituent engagement; beginning to center community voice • Increased coalescing around equity priorities • Sense of acceptance, interest, increased engagement, or excitement related to emergent partnership agenda and approach 	<ul style="list-style-type: none"> • Sustained stakeholder commitment • Internalization of shared mission among stakeholders and organizational roles and responsibilities • Clear processes and previous experiences for resolving tensions or disagreements • Possible sense of stasis leading to early phases of apathy • Latent desire for renewed energy and commitment or momentum 	<ul style="list-style-type: none"> • Diminishing energy, enthusiasm, and investment in the shared effort • Organizations and stakeholders act in self-preservation and power positioning • Increasing community resistance and dissatisfaction • Volatility in interpersonal relationships at leading organizations • Shifts in perceptions and organizational partner intentions 	<ul style="list-style-type: none"> • Community or community partners unsure of priority issues or whom (organizations, partners, funders, etc.) to trust • Community organizations and stakeholders initiate advocacy efforts in scattered areas to voice self-determination and ownership • Increased curiosity, acceptance of new partners and perspectives, and acceptance of need for new vision and approach

Worksheet 1: Reflection questions

1. What **patterns** do you notice in your responses? Do your responses tend to cluster in a single column — that is, around a common community ecocycle phase? If not, do any other patterns stand out?
2. What is the **primary evidence or sources of information** that you used or relied upon to make your selections? (List specific individuals, community connections, previous grantmaking activity.) To what extent are your sources adequate for a full understanding of community conditions?
3. What are some of your current **gaps in understanding**? Who or what organizations in the community would be well positioned to fill in those gaps, or who might offer a different perspective from your own?
4. Based on your current knowledge and reflection, what is the community's **current, predominant ecocycle phase**?


Reflection notes:



Worksheet 2: Aligning Philanthropic Investments to Community Ecocycle Phase

Instructions

- Line up your completed Table 1 with Table 2; circle the list of philanthropic investments that corresponds to the predominant community ecocycle phase you identified for each row in Table 1.** For instance, if you circled Productive Disruption for the Organizational Strategies and Practices row, circle the same descriptor for that row in Table 2. The list of philanthropic investments correlates to the conditions you identified earlier. Similar to the descriptions in Table 1, this list is not exhaustive, but rather presents possible investment approaches. The options listed have been crowd-sourced during the development of this tool. It is very likely that there are other investment approaches not noted, or that some investment approaches may be applicable across ecocycle phases.
- Respond to the reflection questions.** These questions will prompt you to consider evidence, questions, and next steps to better understand the types of philanthropic investments that are likely to be better matched to the current community ecocycle phase.

Table 2: Sample philanthropic investments by community ecocycle phase

Domain	Ecocycle phase			
	Planning/Prototyping	Maturing/Sustaining	Productive Disruption	Re-Visioning/Exploring
 <p>Organizational strategies and practices: Programs and policies</p>	<ul style="list-style-type: none"> • Community needs assessments • Pilot programming • Strategic planning • Organizational staff and stakeholder engagement • Workplan or action planning; programmatic implementation support • Organizational and community leadership development 	<ul style="list-style-type: none"> • Investments to address disparities in outcomes or distribution of services • Scaling of best practices • Policy support to sustain supportive regulations or funding • Unrestricted or general operating support to continue momentum • Targeted investment to close equity gaps (access, outcomes) 	<ul style="list-style-type: none"> • Community needs assessments to support rapid response • Short-term programmatic support for acute or immediate community needs • Short-term funds to address acute or immediate organizational or initiative needs (for example, stop-gap or last-dollar programmatic supports) 	<ul style="list-style-type: none"> • Landscape analysis • Organizational assessments • Strategic planning • Equity, diversity, and inclusion assessments • Root cause or historical needs assessments

Domain	Ecocycle phase			
	Planning/Prototyping	Maturing/Sustaining	Productive Disruption	Re-Visioning/Exploring
 <p>System infrastructure: Partnership capacity</p>	<ul style="list-style-type: none"> • Support for building partnership capacity, training, or infrastructure • Cultivation and encouragement of new, diverse partners • Building capacity for learning, evaluability assessments, and pilot program and process evaluations • Organizational capacity building (process, data, leadership, equity and inclusion) • Support to identify or cultivate trusted community backbone and intermediary • Developmental evaluations • Advocacy support • General leadership development 	<ul style="list-style-type: none"> • Scenario or future planning or strategic refresh for the partnership or key organizations • Sustaining investment in partnership management and backbone support • Thought leadership and dissemination • Communications and visibility support • Formative and summative research and evaluation investments 	<ul style="list-style-type: none"> • Coaching/leadership supports to build a diverse set of leaders • Partnership convenings or town hall meetings • Landscape scans and research to identify alternatives and applicable or importable lessons and approaches • Tying off funding for strategic conclusion of shared initiative • Identifying, funding, and introducing new possible organizational partners 	<ul style="list-style-type: none"> • Strategic planning • Leadership development or leadership transition support • Support for new partner engagement • Resource or fund development • Convenings to bring a new cadre of community stakeholders into the conversation
 <p>Guiding principles: Relationships and power dynamics</p>	<ul style="list-style-type: none"> • Communications investments to build public will and buy-in • Deepened community engagement and continuous feedback loops • Community advocacy training and support • Communications and messaging support, focused on diverse stakeholders and audiences • Advocacy- and power-building trainings focused on equity and inclusion 	<ul style="list-style-type: none"> • Public policy and advocacy supports • Support for decentralized power shifts or community ownership • Elevation of Black, Indigenous, and people of color (BIPOC) leaders and BIPOC-led organizations • Support and cultivation of rising organizational and community leaders • Approaches to celebrate and name successes 	<ul style="list-style-type: none"> • Organizing supports • Community reconciliation or healing supports • Creating forums for diverse stakeholders to develop and communicate needs or demands • Support for organizational consultants to provide guidance to assess and redirect efforts 	<ul style="list-style-type: none"> • Communications and messaging support • Community-organizing supports to advance vision setting and relationship building • Community and organizational equity assessments

Worksheet 2: Reflection questions

1. Given your shared understanding of the community's current ecocycle, what **primary kinds of investments** did the table elevate? What might be missing?
2. To what degree do these ecocycle phase-aligned investment strategies **align or differ from your current grantmaking strategy or approach** in the community? To what extent can you support and apply the recommended investment approach? Where may you need to partner with other funders to best support the community?⁶
3. Given your understanding of the community's ecocycle phase, **to what extent will your investment catalyze, bolster, or accelerate the community's movement through the ecocycle?** Why? How can funding support desired community transitions?
4. What additional **information do you need to identify the right kind of investment?** Who or what organizations in the community would be well positioned to share that information, or who might offer a different perspective from your own?
5. If you have not done so already, **how might you bring this tool to community leaders, funding partners, and other stakeholders** as you consider your place-based systems change investment?

Reflection notes:

What comes next?

We recognize that the archetypes of four distinct phases may be insufficient to capture the complex dynamics within a place-based systems change initiative. Yet we believe they provide a useful grounding and, perhaps as importantly, an argument that funders must know communities well in order to support strong systems change efforts within them. We hope that this tool has prompted insightful reflection and consideration of the ways in which your systems change efforts can be more effective by being attentive to the community's phase within the ecocycle. The investment strategies presented in this tool are designed as a starting point for determining potential well-aligned investments and to help support a process of inquiry with community stakeholders.

As you continue to invest in place-based systems change, we urge you to regularly consider the following:

- How can you authentically engage community leaders and constituents in the process of both continuously assessing current community conditions and ecocycle phase and refining your investment approaches to match evolving needs?
- How can your overall philanthropic investment strategy better match and stay attuned to current and shifting community needs and an understanding of the community's dynamic ecocycle phases?
- What are practical ways to ensure that your investments are timely and matched to what your community partners and constituents need?

Moving from phase to phase in the community ecocycle is both inevitable and a necessary and additive dimension of place-based systems change efforts.

A co-designed approach can help community leaders and funders anticipate—and therefore be more responsive to—the opportunities and challenges that are inherent in a dynamic community change effort, increasing the likelihood of sustained impact.

Acknowledgements

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FIND & FOLLOW US:

To learn more or get in touch with the authors of this tool, email Meg Long, Wanda Casillas, or James Liou.

We are actively crowd-sourcing feedback to this tool and would be happy to hear from users about their experiences and suggestions for further refinement. If you have comments, additions, or considerations for improvement, or are willing to share your experiences engaging with the tool, please contact us at communications@equalmeasure.org

Appendix: Resources and Links for More Information

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Endnotes

¹ Although this tool is intended for foundations, the content may be helpful for any organization that supports place-based systems change efforts, including intermediaries that provide technical support, capacity-building organizations, or those serving as backbones in communities.

² See our companion tool, "Investments in Implicit and Explicit Dimensions of Place-Based Systems Change: A Tool for Funder Reflection and Action." Available at <https://www.mathematica.org/our-publications-and-findings/publications/investments-in-implicit-and-explicit-dimensions-of-place-based-systems-change-a-tool-for-funder>.

³ It is important to note that we use terms like *community* and *place* somewhat interchangeably, but mostly to indicate some collection of groups or people that are geographically and socially bound by a common set of characteristics that are determined to be of interest or focus for investing, program development, or community improvement.

⁴ *Guide to Ecocycle Mapping*. Available at <https://www.fsg.org/tools-and-resources/guide-ecocycle-mapping>.

⁵ As a conceptual framework, the ecocycle is a schematic that oversimplifies complex systems change processes, and the definitions presented within are descriptive and not exhaustive. The order of phases presented is also for illustrative purposes. Communities and partnerships may skip phases or cycle in different directions.

⁶ See our companion tool, "Investments in Implicit and Explicit Dimensions of Place-Based Systems Change: A Tool for Funder Reflection and Action." Available at <https://www.mathematica.org/our-publications-and-findings/publications/investments-in-implicit-and-explicit-dimensions-of-place-based-systems-change-a-tool-for-funder>.

