



METRICS AND MARKERS

Shared ways we notice progress, patterns, and learning

THE
WINSTON-SALEM
FOUNDATION

STRATEGIC PRIORITY 1:

Community Outcomes

Goal 1.1:
Develop transformative strategies focused on advocacy, engagement, and knowledge-sharing



Recognition for Community-Driven Expertise and Impact

- Number of public mentions and media coverage referencing WSF's work
- Examples of WSF being cited or invited as a thought partner or field contributor



Community Presence and Strategic Partnerships

- Participation/attendance levels at WSF-hosted events
- Examples of co-investment partnerships/funder collaboratives that advance community-driven strategies for systems change



Learning With and From Community

- Examples of community feedback loops and input opportunities
- Examples of learnings or insights documented and shared internally and externally

Goal 1.2:
Implement impactful programs, initiatives, and investments, guided by those most affected



Aligning Our Work and Resources With Community Priorities

- % of grants, initiatives, or investments that are community-informed or co-designed
- Evidence of increased funding to priorities identified by impacted communities



Collaborative Co-funding with Fundholders and Community Partners

- Examples of co-funding opportunities created for donors/fundholders to support
- Stories of shared learning or decision-making with fundholders and partners

STRATEGIC PRIORITY 2:

Resource Development

Goal 2.1:
Increase WSF guidance on donor-advised grantmaking; facilitate increased grantmaking in Forsyth County



Deepening Fundholder Engagement and Local Giving

- Number and dollar amount of donor-advised grants made to Forsyth County orgs
- Number of fundholders receiving tailored guidance or outreach related to local giving



Strengthening Fundholder Relationships and Support

- % of steward-assigned fundholders with at least one interaction with their WSF steward each year
- Increase in fundholders demonstrating increased affinity (long-standing relationships, additional funds, estate plans, event attendance, increased grantmaking)

Goal 2.2:
Explore and implement innovative investment opportunities and revenue streams



Increasing and Diversifying Funding

- Examples of new funding streams or revenue-generating initiatives launched



Advancing Local Impact Investing Knowledge and Practice

- Examples of partners co-investing in our local impact investing

Goal 2.3:
Maximize giving potential of current donors and engage new audiences



Growing Contributions and Donor Engagement

- Total contributions received from current and new donors (emphasis on permanent funds, strategic initiative dollars, unrestricted)
- Number of new donors/new members of strategic initiatives

STRATEGIC PRIORITY 3:

Organizational Effectiveness

Goal 3.1:
Adapt and evolve strategies and behavior based on learning



Learning-Driven Strategy and Adaptation

- Examples and evidence of strategy shifts or enhancements made based on internal or external learning
- Examples of decisions influenced by staff, partner, or community feedback



Effective Collaboration and Shared Strategic Alignment

- Examples of cross-team or cross-role collaboration
- Evidence of shared language or understanding around strategic priorities among staff and Committee

Goal 3.2:
Cultivate a skilled, aligned, and knowledgeable staff and board through continuous learning



A Thriving Culture of Growth, Belonging, and Accountability

- % of staff who report they are receiving the feedback and support they need to achieve their annual goals
- Staff survey score on belonging and alignment with values



Clear, Consistent Ways of Working that Support our Strategy

- Examples of process improvements or refinements made
- Examples of how shared ways of working have supported implementation or alignment

A CLOSER LOOK: METRICS AND MARKERS STAGES

Each metric or marker is assigned to a stage based on what kind of work is currently happening. The stages describe whether we are still learning what matters, building a shared understanding of our current state, or intentionally tracking change. Growth does not always mean moving to the next stage.



Seed – Defining What to Notice

MEANING:

We are identifying what matters, how it shows up, and what kinds of evidence are meaningful.

WHAT'S HAPPENING:

- Clarifying definitions (e.g., what counts as a "mention" or "engagement")
- Gathering early, varied examples
- Testing whether a marker provides useful insight into the goal

GROWTH MAY LOOK LIKE:

- Clear articulation of what counts and what does not
- Increased agreement across staff about which signals are relevant
- Questions becoming more specific and actionable



Sapling – Establishing a Baseline

MEANING:

We are gathering information consistently enough to understand our current state, so that we can assess change over time.

WHAT'S HAPPENING:

- Information is being collected in a repeatable way
- We can describe "where we are now" using shared language
- Early patterns are visible, even if trends are not yet clear

GROWTH MAY LOOK LIKE:

- Fewer unresolved questions about definitions or scope
- More consistent documentation across time, teams, or activities
- A clearly stated baseline that multiple people would describe similarly



Tree – Knowing What Change We're Seeking

MEANING:

We have a stable baseline and clarity about the direction of change we want to see, even if that change is not purely numeric.

WHAT'S HAPPENING:

- The desired direction of change is explicitly defined
- Quantitative markers are being tracked consistently against a baseline
- Evidence (quantitative and/or qualitative) is sufficient to inform decisions

GROWTH MAY LOOK LIKE:

- Quantitative markers show movement over time in the intended direction
- Repeated patterns that indicate movement in the intended direction
- Decisions or adjustments that explicitly reference the data being tracked
- Increased confidence in using this information to guide strategy or resource allocation