FSG REIMAGINING SOCIAL CHANGE

[SUSTAINING IMPACT]

A Kit for Working Group Co-Chairs in Collective Impact

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Daniela Uribe, Carina Wendel, Valerie Bockstette

WHY A KIT FOR WORKING GROUP CO-CHAIRS?

Working Groups in collective impact are where goals are brought to life. They are where practitioners come together to contribute their time, expertise, passions, and lived experiences to co-develop and co-implement solutions. Much has been written about the role of backbone staff in ensuring productive Working Group meetings. However, we know that one of the reasons backbones can be leanly staffed is that they rely on select Working Group members who go the extra mile and volunteer to be Working Group co-chairs. Over the years we have seen how critical these co-chairs are to the success of collective impact, and yet, not much has been written about or explicitly for these important figures in collective impact. This kit is for them. FSG originally developed this kit for a collective impact initiative funded by the Hampton Roads Community Foundation. We are grateful that they have enabled and encouraged us to make this kit available publicly. Moreover, while we wrote this kit specifically for Working Group co-chairs, the contents of the kit are also helpful for backbone staff and co-chairs of Steering Committees and other groups that are part of the collective impact process.

WHICH ROLES DO WORKING GROUP CO-CHAIRS PLAY?

Working Groups typically have 2-3 co-chairs, ideally with one co-chair also serving on the Steering Committee, playing the following critical roles:

- Contributing to the development of the **agenda and content** for each Working Group meeting – including serving as thought partners to backbone staff and helping contribute content expertise
- **Facilitating discussions and decision-making** during Working Group meetings – including speaking up if conversation gets stuck, leading discussions, facilitating / reporting out on smaller group discussions
- Contributing to **Working Group member management** – including addressing a member's concern outside of a meeting or learning more about a member's role / experience to help inform strategies
- Holding **relationships of and between Working Group members** – including understanding each member's unique assets and contributions
- Serving as an **ambassador for the effort's work** in the community – including speaking at community events, updating community members on progress, or making a connection to important stakeholders

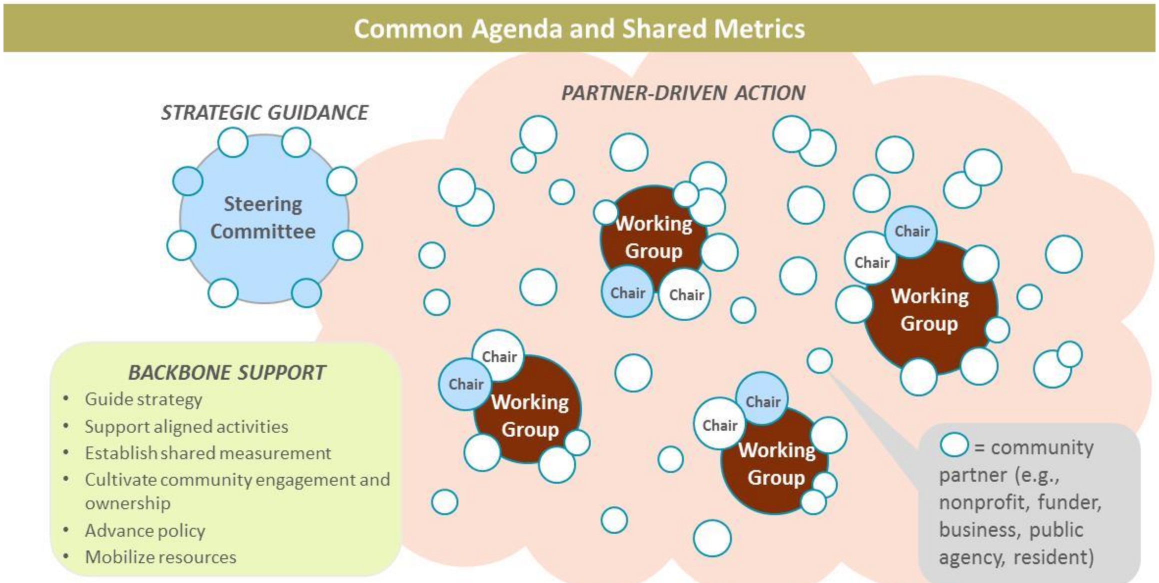
WHAT'S IN THIS KIT?

***INTRODUCTION:* The critical role of Working Groups**	
MODULE 1: **How to build Working Group membership**	***MODULE 2:*** **How to run collaborative and effective meetings**
MODULE 3: **How to build a culture of collaboration**	***MODULE 4:*** **How to put systems thinking into practice**
MODULE 5: **How to engage and work with the community**	***MODULE 6:*** **How to be data-driven and learn along the way**
***APPENDICES:* Practical templates for meeting planning and follow-up**	

FOSTERING DIVERSITY, EQUITY, AND INCLUSION is emphasized across the modules. This starts with creating a diverse working group membership (Module 1), creating the conditions for everyone to feel and be included (Modules 2-4), thoughtfully engaging the community (Module 5), and using data to understand disparities and make decisions (Module 6). It is only by engaging those traditionally left on the sidelines, whose experiences and challenges have been so often overlooked, that Working Groups will find effective and lasting solutions to systemic issues.

INTRODUCTION: *The critical role of Working Groups*

As illustrated below, Working Groups are where action occurs in collective impact:



* Adapted from *Listening to the Stars: The Constellation Model of Collaborative Social Change*, by Tonya Surman and Mark Surman, 2008.

WHO 15-25* **people who represent key aspects of the system** the Working Group is focused on
(enough people to represent the whole system, but not so many that meetings become unwieldy)*

HOW Facilitated by backbone staff and **working group co-chairs**

WHAT Meet regularly* to drive the implementation of the initiative by engaging in **3 ACTIVITIES** over time *(*we recommend monthly to ensure sustained momentum and progress)*:

1) **Determining the SCOPE of the Working Group** (and re-scoping over time), grounded in research and data on the local situation (e.g., gaps and assets) and national best practices
2) **Developing an ACTION PLAN, which may include the following:**
    - ***Better understanding the current situation:*** *get existing data systems aligned and / or overlaid with one another*
    - ***Learning by trial:*** *identifying an opportunity to start small with willing partners, learn from the experience, and then expanding / replicating*
    - ***Increasing coordination:*** *finding ways to re-align existing programs, protocols, and stakeholders to work together differently to maximize efficacy and efficiency*
    - ***Enhancing services:*** *adopting a previously unnoticed evidence-based practice from inside or outside the community to enhance existing services / programs*
    - ***Identifying policy change opportunities:*** *looking for opportunities at local or state levels and relaying these to Steering Committee and / or policy & advocacy working group*
3) **Driving the IMPLEMENTATION of the action plan by:**
    - ***Identifying resources*** *(e.g., volunteers, funding) required to put ideas into action*
    - ***Inspiring change*** *in their own organizations and networks in accordance with the action plan*
    - ***Determining how to measure*** *the Working Group's progress and success*
    - ***Providing updates to the Steering Committee*** *and responding to their feedback*

MODULE 1: *How to build Working Group membership*

Why this matters: Working Groups are called *working* groups for a reason. Just as the Steering Committee is tasked with steering the direction of the initiative, Working Groups are responsible for the work that will drive the impact of the initiative. Understanding the roles and responsibilities of Working Group members will ensure that the right individuals in the community are participating in this capacity, and that Working Groups are set up for success.

How to think about it: Finding the right people to fulfill the role of Working Group members (including the co-chairs) may be the first big opportunity of a collective impact initiative. Collective impact initiatives create opportunities for many people to be involved through various groups and levels of engagement, so it is important to make sure that individuals are participating in the roles that best suit them. Below are some key characteristics to look for in Working Group members:

All Working Group members *(15-25 members)*	- Have first-hand experience with the issue (i.e. frontline workers, members of the community, etc.) - Are knowledgeable, issue-aligned, and ready to collaborate - Are action-oriented "doers" who can commit to attending meetings and reviewing pre-read materials; we recommend a norm of not sending substitutes to meetings as continuity of participation is very important - For staff of nonprofits or agencies, are usually not as senior as Steering Committee members, but have authority to represent organizations and make decisions
Co-chairs *(typically 2-3 co-chairs, each from a different organization)*	- Can commit the time (~3-4 hours / month plus meetings, but will vary) - Are collaborative leaders and facilitators, who "get stuff done" - Are willing and able to act as the day-to-day doers with an adaptive leadership style, ready to facilitate meetings, take notes, potentially handle scheduling and delegate tasks to the rest of the group, as well as bring intellectual leadership - Are not simply symbolic leaders; the success of the initiative hinges on the strength and commitment of the Working Group co-chairs

Being part of a Working Group often creates leadership opportunities for staff or community members that they otherwise may not have, which can be incredibly exciting and inspiring. In many cases there will already be an engaged community of leaders, practitioners, residents, and many other types of stakeholders devoted to improving outcomes in the areas that Working Groups will focus on. This presents an opportunity to tap into existing networks, affinity groups, and collaboratives that might exist as a source of Working Group members. Though every community will have different dynamics and needs, the following bullets provide ideas for recruiting Working Group members:

- **Hold community-wide meetings and focus groups**, which may help identify potential Working Group members based on interest, passion, and availability
- **Attend existing community meetings** to identify and recruit members
- **Tap into the Steering Committee:**
    a) **Consult with Steering Committee members** for their ideas. Steering Committee members may suggest other staff at their organizations or others in the community they deem fitting
    b) Ask the backbone staff if during the common agenda development a **mapping of key actors** was done
    c) Some **Steering Committee members often serve as Working Group co-chairs** as well

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Make the case	- During recruitment of members – and as the Working Group starts and sustains its work – remember to stress what participants will get out of their membership, be it an opportunity for professional development, new content knowledge, new connections for their organization, etc.
Take and share ownership	- Once the Working Group begins to take shape, transition from relying solely on the Backbone to relying on fellow co-chairs or other Working Group members to lead and manage some of the activities (and meetings) of the group.
Connect the dots and avoid creating new isolated efforts	- Ensure there is inclusive representation of the community in the Working Groups. - Think about whose voices are usually represented in other initiatives, and strive to include those who might be left out. This could include residents from neighborhoods that are disconnected from the mainstream, members of the business community, racial and ethnic minorities, youth, and other stakeholders that go beyond the "usual suspects" involved in community efforts. - There should be cross-sector representation within each Working Group to incorporate multiple perspectives from which to identify and solve problems.
Don't avoid discomfort	- It is healthy to have deep debate in Working Group meetings and to get members with different opinions to understand each other's viewpoints. When recruiting members, actively look for people who may have conflicting perspectives. - If Working Group meetings don't get slightly uncomfortable at times, then the membership likely includes perspectives that are not diverse enough.
Adapt to twists and turns	- While an underlying focus of each Working Group is initially determined, the specific areas of focus and goals will change over time. - As groups form and settle and as members' availability change, it is possible that Working Group membership will evolve.

TOOLS & RESOURCES

Learn more:

To get an idea of who to recruit for Working Groups, it can help to understand in more detail what Working Groups actually do. The samples below can help inspire ideas for who one would want around the table in a Working Group:

- Sample Working Group **work plan**: Douglas County Operation Youth Success Work Plan 2015, Families Working Group
- Sample Working Group **goals**: Communities that Care Coalition
- Sample Working Group **strategies**: Essentials for Childhood Washington
- Sample Working Group **activities**: Health & Wellness Alliance for Children

Explore in depth:

- "Committing to Collective Impact: From Vision to Implementation" (Collective Impact Forum)
- "Promoting Participation Among Diverse Groups" (Community Tool Box from the University of Kansas)

MODULE 2: *How to run a collaborative and effective Working Group meeting*

Why this matters: Once Working Group members have been recruited and attend the first meeting, the goal is to keep them coming back. Even more important is making sure that the meetings are effectively making progress towards the goals of the Working Group. Some Working Group members may have experienced meetings that have an unclear purpose, poor scheduling practices, and limited follow-up. In an effort to work together more collaboratively and effectively, co-chairs should see running great meetings as absolutely critical to the process of creating change.

How to think about it: Preparation, facilitation, and follow-up are critical to effective, collaborative Working Group meetings. See **Appendices A-D** for templates on some of the tactical aspects of running meetings, such as staying on track of scheduling, taking notes, planning the agenda, and summarizing action items. Backbone Staff and co-chairs can help support Working Group progress in various ways throughout the month. For example, a typical monthly workplan may look like this:

Week 1: Facilitate Working Group meeting	• **Backbone and Co-chairs:** → Play an active role in the Working Group meeting. This may include being a prominent voice during difficult discussions or leading part of the meeting. → Make note of Working Group members that require additional attention in between meetings (i.e., have important content expertise, expressed a concern to address offline).
Week 2: Follow-up after meeting	• **Backbone:** synthesize the discussions / decisions of the Working Group meeting and send a follow up email to the Working Group. • **Co-chairs:** less active role but may schedule time to speak with Working Group members that require additional support.
Week 3: Design the agenda	• **Backbone:** translate the follow-up items and longer-term goals into an agenda and prepare the required content for the next month's meeting. • **Co-chairs:** engage in setting the agenda. Specific activities may include: → Share feedback on the proposed meeting objectives, agenda and required materials to support a rich discussion. Co-chairs can serve as a sounding board to the Backbone staff to ensure the group is moving forward at the right pace. → Provide feedback on which parts of the agenda may be contentious and ideas of how the group can best manage these discussions to get to the desired outcome.
Week 4: Prepare the facilitation plan	• **Backbone:** finalize the content (i.e., data, research, slides) and facilitation plans for the next Working Group meeting. • **Co-chairs:** engage on the facilitation plan, for example: → Volunteering to take on a specific role in the Working Group meeting. Roles to be divided among co-chairs and Backbone staff include: introductions / welcome and ice breaker activities; facilitation of specific agenda items and breakout groups; note-taking; closing.

*(See **Appendix A** for Working Group Meeting Planning Steps for Co-Chairs and **Appendix B** for a sample Agenda)*

Working Groups can expect the first five meetings to cover the following:

MEETING		
	#1	Members introduce themselves and discuss the overall goal(s) of the Working Group.
	#2	Fine-tune the goal(s), identify questions to explore together, discuss what data is needed in order to develop strategies. Data could be related to understanding the magnitude of a particular problem, a list of what is working, an actor map to understand the system, etc.
	#3	Analyze data together and come up with potential strategies; determine criteria for prioritizing among these strategies.
	#4	Choose 1-2 short-term strategies / interventions likely to deliver “quick wins” and 1-2 long-term strategies / interventions.
	#5	Align on action plan for short-term (e.g., identify which partners / players to engage, what specific activities to pursue, how to measure results, who else is needed at the table) and determine data needs to start planning the long-term strategies / interventions.

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Be fastidious about work planning to stay a step ahead	- Establishing a good system to prepare for and execute meetings will save you time down the line. With a clear system in place, staying organized and on track will be easier even if it requires an upfront investment.
Give facilitation and materials equal importance	- Spend as much time (or more) planning the facilitation approach as preparing the materials for the meeting. See **Appendices A and B**. - Focus on how you will get the group to be creative and make decisions.
Accomplish something during every meeting	- Make sure there is something to check off or decide on during every meeting and note those decisions at the end. Not only does this drive progress, it also motivates members to continue their participation with enthusiasm and commitment if they see constant, even if small, achievements.
Maintain a longer-term plan	- When you draft an agenda, have the next two agendas in mind and preview these in the meetings so each member sees the long-term arc.

🛠OOLS & RESOURCES

How:

- **Appendix A** Working Group Meeting Planning Steps for Co-Chairs
- **Appendix B** Working Group Meeting Agenda Template
- **Appendix C** Meeting Follow-up Email Template - Working Group
- **Appendix D** Meeting Follow-up Email Template - Steering Committee

Explore in depth:

- Acquiring and improving **facilitation skills** can be particularly beneficial for co-chairs to run meetings in productive and creative ways. Resources exist online, such as:
  - **Liberating Structures-** These are 33 adaptable “mini-structures” that can be used to facilitate collaboration. The Liberating Structures website provides a wealth of resources and examples to use as inspiration.
  - **Interaction Institute for Social Change-** This organization provides in-person facilitation trainings with a focus on social change. Their blog is a good resource to learn about facilitation and collaboration in the social sector.

MODULE 3: *How to build a culture of collaboration*

Why this matters: Working Group members will come from many different sectors, communities, and backgrounds. Past experiences collaborating may be limited, and in some cases even unsatisfying or disappointing. There is, however, an opportunity to build an open and collaborative culture in the Working Groups, one where there is trust, respect, and commitment to creating positive change. Without a culture of collaboration, the Working Group may not be able to achieve everything that it could. Setting the stage for the Working Group's dynamics and tone is critical, and doing so begins with the very first meetings. Ideally, Working Group members feel inspired, connected, and motivated to bring their full selves and energy to the work.

How to think about it: Building a culture of collaboration is ongoing work. It is never "done" and entails creating cultural norms and expectations that create a safe space for participants to build trust over time. This trust is a critical ingredient when the time comes to develop shared goals, strategies, and ownership for the Working Group. **Here are some things to keep in mind before, during, and after the meetings** that will help cultivate a culture of collaboration:

BEFORE	**Make sure to anticipate tension and prepare different engagement techniques to build a productive environment.** - Anticipate which **topics might be sensitive** to members and have **pre-conversations** to clear the air and address concerns, or let members who might be **shy about speaking up** brainstorm with you in advance to get them more comfortable. While all members should have equal power and voice, they can be engaged differently to adapt to personalities and needs. - Consider who might have a **hard time participating**. Plan exercises that **create safe environments**, such as pair-sharing in addition to large group conversations. - Consider **different learning styles**. Share content via various mediums when possible (e.g., visual, verbal, guest speaker testimonial). - Plan ahead if there is a **thorny topic to address**. Try to **pair difficult conversations with something lighter** so that the meeting is not difficult and divisive in its entirety.
DURING	**Facilitate motivating and inspiring meetings that foster connections between people.** - During the first meeting and throughout, ask questions like "why is this work personally important to you?" to **provide opportunities to reflect and open up to the group.** - **Use ice-breaker exercises** provided in the resources section below. - **Provide ground rules** that encourage respect and appreciation of all experiences, ideas, and people. See sample "ground rules" in the resources section below. - **Observe** tensions, political dynamics, how people are engaging with information, and whether or not people feel comfortable sharing as part of a group. Respond to those observations live, and plan accordingly for future meetings.
AFTER	**Learn from meetings to continuously build trust and openness.** - **Make use of observations** from the previous meeting to improve future meetings. - Understand who needs what kind of **support in between meetings** based on concerns or tensions that surfaced and schedule a brief call with them. - Consider instating an **"offline comment collector"** to gather thoughts from those who did not feel comfortable sharing during the meeting and / or an **online shared workspace** for working group members.

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Foster diverse perspectives	- When creating small discussion groups, be intentional about putting people with different perspectives together. It helps each person gain a broader understanding of the system and develop unlikely relationships. - Strive to show appreciation for the ideas and perspectives brought to the table by each member.
Avoid binary choices	- Don't present clear-cut divisive options that will divide the room. Provide a spectrum of choices that could foster middle ground. For example, instead of choice A and choice B, provide choices in between like "I could live with A if…". - Frame and facilitate difficult decisions as consensus-building rather than a vote, and create room for give and take.
Give thinking space	- Provide a space for everyone to collect thoughts individually and participate in a smaller and more accessible environment before launching into a large group conversation. - Don't rush to decisions if many working group members are not present – frame meeting results as pending feedback from more of the group.
Recognize that collaboration is a process	- Constantly reiterate the broader goals of improving the collaborative *process* (and not just the initiative's outcomes) to cultivate camaraderie and shared purpose as Working Groups get better at working together. - Even small changes in mindsets and dispositions lay the groundwork for an effective process and sustained work together.

🛠OOLS & RESOURCES

How:

- These **sample "ground rules"**, which can be customized to fit the needs of different groups, may help Working Groups have productive, constructive conversations:
    1. Listen actively and do not interrupt if someone is speaking
    2. What is said here, stays here; What is learned here leaves here
    3. No one knows everything; together we know a lot
    4. Notice your experiences, emotions and feelings
    5. Speak from the I, not for the group
    6. We cannot be articulate all the time
    7. Expect and accept a lack of closure on some topics
- **Relationship building and small-group conversation exercises, such as icebreakers**, can provide valuable opportunities for bonding and creating a more relaxed atmosphere, especially during the first few meetings of a Working Group.
    - "Compendium of useful, purposeful introduction/warm-up/icebreaker exercises" (Collective Impact Forum)
    - "Collective Impact #ToolBox: Icebreakers" (Living Cities)
    - World Café- a method designed to create a safe, welcoming environment in which to intentionally connect multiple ideas and perspectives on a topic.

Explore in depth:

- Moving Beyond Icebreakers: An Innovative Approach to Group Facilitation, Learning, and Action
- *Link to: Facilitating Intentional Group Learning*

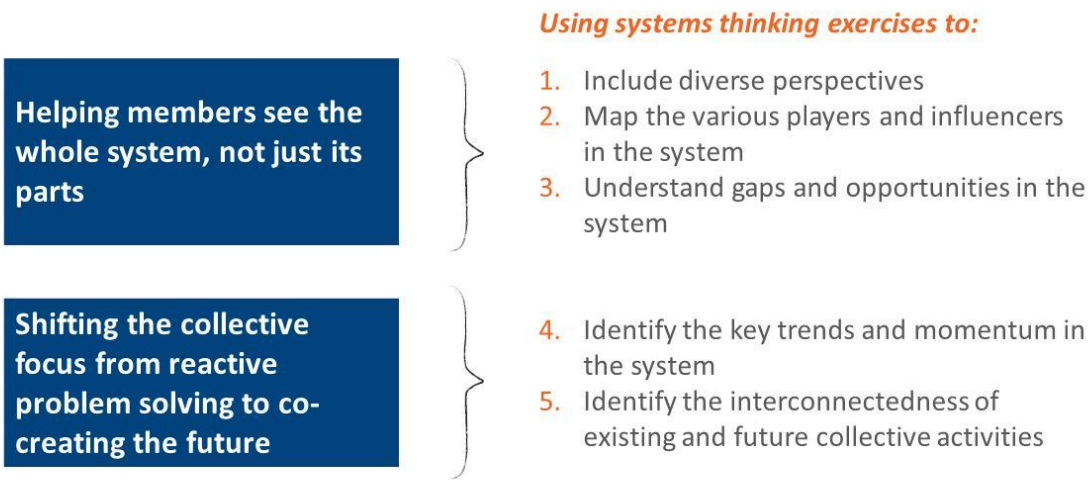
MODULE 4: *How to put systems thinking into practice*

Why this matters: After a common agenda for the initiative is drafted, Working Groups will determine what work needs to be done in each of their areas- and across them- to make the common agenda a reality. This is challenging work that will require coordination among players from many sectors and deep collaboration among people who may traditionally work in isolated efforts and organizations. It is critical, then, to ensure that Working Groups consider the system in which they are driving change, and not just its disparate parts. When embraced, systems thinking allows collective impact initiatives to better understand the context around an issue or organization(s), the connections among actors and organizations within a system, the patterns that seem to influence how a system works, and the diverse perspectives of those that influence and are influenced by a system. This perspective leads to more effective problem solving.

How to think about it: Everything in a system (a collection of organizations, people, and rules that share a purpose) is connected; events in one part of the system affect all or some of the other parts. "Systems thinking" is defined as the ability to see how social systems, sub-systems, and their parts interact with and influence each other, and how these systems create and contribute to specific problems.[1] According to Peter Senge, the three characteristics of systems thinkers are:

- A willingness to **challenge your own mental model** – accepting your own role in problems and being open to different ways of seeing and doing
- Always **including multiple perspectives** when looking at a phenomenon (See Module 5 for more information)
- A consistent and strong **commitment to learning** (See Module 6 for more information)

There are numerous practical tools Working Group co-chairs can use to put into practice the ideas behind systems thinking. Using those tools (see the resources section in this module for some examples) Working Groups will be able to engage in systems thinking by:[2]



For example, Working Groups can use an actor map as a visual depiction of the key organizations and / or individuals that make up a system, as well as their connections and relationships to one another and to a given issue, project, or goal. There are instructions for completing, and engaging with, an actor map and other exercises in the resources section below.

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[1] Adapted from *Systems Thinking: How to Lead in Complex Environments.* Robert Bullock, 2013. Available online.

[2] Graphic based on *The Dawn of System Leadership. (2015)* Peter Senge, Hal Hamilton, John Kania. Stanford Social Innovation Review.

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Remember and remind others of the system	- Try to move out of the day-to-day mindset of “what can I do” and towards “what can we all do together”; avoid exercises that just result in people listing their organizations’ great programs, rather stimulate conversation on how working together can help everyone achieve more. - Reminding the group of “the big picture” could be as simple as writing the shared vision for the initiative on a whiteboard during every meeting, or placing it at the top of the agenda circulated prior to meetings each month.
Remember that it’s about the journey, not just destination	- There is significant value in the process that systems thinking tools facilitate and the conversations they stimulate—not just in the products they yield.
Embrace the tensions	- Different settings, standards, and social norms create tension— successful systems thinking exercises allow groups to productively engage with, rather than circumvent, these tensions. - Do not shy away from tough conversations; rather, intentionally invite disparate perspectives to the table.

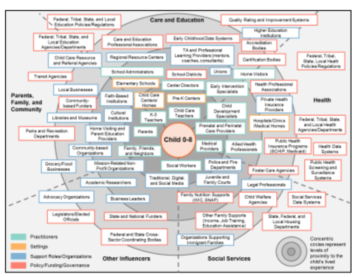
OOLS & RESOURCES

Many **system mapping and other systems thinking exercises** are available, including:

Trend mapping

A **visual depiction of relevant trends** influencing the system around a given topic. It is developed using the collective knowledge and experience of a group familiar with a given system and its context.

Actor mapping



A **visual depiction of the key organizations and / or individuals that make up a system,** as well as their connections and relationships to one another and to a given issue, project, or goal.

World Café

A **method designed to create a safe, welcoming environment in which to intentionally connect multiple ideas and perspectives** on a topic by engaging participants in several rounds of small-group conversation.

- **Timeline mapping**- a process of arranging important events, actions, activities, achievements, and other milestone markers in chronological order, to see them in temporal relationship to one another and to key contextual factors (e.g., social, economic, political, demographic, and cultural events and trends).
- **Habits of a Systems thinker**- a collection of ways of thinking about how systems work and how systems thinkers can think and problem-solve creatively within systems. (Waters Foundation)

MODULE 5: *How to engage and work with the community*

Why this matters: Engaging and working with your community (or "community engagement")[3] in collective impact is a critical part of creating effective and sustainable strategies to drive change. It is by engaging the wisdom, voice, and experience of community members who are closest to the challenges the Working Groups are seeking to address that collective impact is able to create opportunities for greater equity. Bringing new voices to the table is critical and rewarding, but it may also be challenging. Engaging Working Groups and the community in issues of equity may mean focusing on racial equity in some contexts, socio-economic dynamics in others, as well as considering issues of immigration status, sexual identity, language and literacy proficiency, etc. The resource section in this module includes ways to equip individuals with the mindset, vocabulary, and willingness to engage in difficult, but deeply necessary, conversations.

How to think about it: Before launching into community engagement efforts, check with the backbone staff to ensure that the engagement fits with the overall community engagement plan for the initiative, and think carefully about the Working Group's goals for engaging the community; these goals could include:

1. **Understand system challenges:** Develop deeper understanding of the community and the root causes of the targeted issue and barriers to change
2. **Co-create solutions:** Spark innovative problem-solving rooted in the "lived experience" of the community
3. **Verify the direction:** Get feedback on specific strategies from the community, particularly those community members who will be the ultimate beneficiaries
4. **Expand reach:** Spread the word on the initiative to more people and widen the scope of those who will develop the will to help implement
5. **Build community capacity to lead change:** Empower and build capacity for your community to engage in collaboration and strategy implementation

Specific activities for each goal, at different levels of depth, could include:

Increasing Level of Community Engagement

	Inform	Consult	Involve	Collaborate	Co-Lead
1 ***Understand system challenges***		Surveys or interviews about lived experience	Engage new voices in Working Groups as members or speakers		
2 ***Co-create solutions***		Interviews about strategies for change	Participatory design of solutions		Recruit community members to lead Working Groups
3 ***Verify the direction***		Public meeting to solicit reactions to Working Group action plans	Advisory group to vet solutions and findings		
4 ***Expand reach***	Press/ ad campaign	Soliciting perspectives of populations not unrepresented		Create community ambassadors	
5 ***Build community capacity to lead change***	Provocative media campaign; community training		Enlist as spokespersons; enlist as trainers	Engagement in a pilot	Offer a training to build capacity on a new practice

Source: IAP2; adapted by the Tamarack Institute.

[3] While there can be significant differences between terms like community engagement, participatory process, and stakeholder participation (among others) what matters most is the *why* and *how* the work is done, and not *what* it is called.

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Don't rely on assumptions about community needs	- Unconscious biases may inform our assumptions about the needs and priorities of the various communities involved in a collective impact effort. - Lay assumptions aside and engage community members –early, openly, and frequently- to help guide the Working Group's direction.
Remember: it is not an event, it is a commitment	- Community engagement is more than a single meeting; it is a commitment to impact that is a constant element in all the work of the initiative. - To be effective, make sure all engagement is authentic (the conversation is needed and valued), and always inform participants of how their input is used (e.g., by sharing important outcomes with the participants and community).
Prioritize quality over quantity	- Ensuring that community engagement is valuable is all about carefully selecting who to engage (demography, geography, gender, types of experiences, etc.), and how (culturally competent and respectful interactions, friendly atmosphere etc.).

Make it easy to engage	- Keep in mind the schedules, needs, and realities of those you are engaging.
	- Customize materials and facilitation to ensure they are user-centric.
	- In addition to scheduling meetings at convenient times and locations, consider:
	  - Carefully selecting who extends invites to community members.
	  - Meeting people where they are, don't make them come to you. Find the people you want to engage (this could be at the bus stop, or the laundromat).
	  - Providing food, childcare, transportation, translation, stipends as appropriate.

A single voice does not represent the whole	- A community is not one entity. It is made up of many perspectives / sub-communities. - Avoid assuming that one member of a community or group speaks for the whole.

Note: While the tips above reflect FSG's experience, some have been largely adapted from a Living Cities blog post.

🛠OOLS & RESOURCES

Learn more: Collective impact practitioners and supporting organizations have written extensively about community engagement and equity. Some of these resources include:

- "How to Talk About Race" and "Race Matters- Community Building Strategies" (Annie E. Casey Foundation)
- "Putting Community in Collective Impact" and "Bringing an Equity Lens to Collective Impact"(Collective Impact Forum)
- "Listening to Those Who Matter Most, the Beneficiaries" and "Roundtable on Community Engagement and Collective Impact" (Stanford Social Innovation Review)
- "Why Involve Community in Collective Impact at all?" and "5 Ways collective impact partnerships can advance equity" (Living Cities)
- "Equity and Collective Impact"(Lumina Foundation)

Explore in depth: A comprehensive resource on community engagement practice is the Living Cities e-Course "The Why and How of Working with Communities through Collective Impact" including:

- "Assessing Your Engagement Strategies"
- "Distinguishing your work: outreach or community engagement? An assessment tool"
- "Applying business concepts to community engagement"

MODULE 6: *How to be data-driven and learn along the way*

Why this matters: Using data is critical in collective impact because it allows Working Groups to ground their conversations and decisions in evidence - both quantitative and qualitative. Learning from data in an intentional and structured way is an essential part of collective impact because it enables assessment of progress towards the common goals, and the continuous improvement of strategy and action. Without data, Working Groups may find themselves "working in the dark": hard at work and committed to impact, but unable to determine the best path forward or the impact of the work underway.

How to think about it: While the Backbone, the data Working Group, and / or local data experts will take the lead on the data activities of a collective impact initiative,[4] Working Groups can use data in tangible ways throughout their work. It is important to remember that data is a means to an end, not an end in itself. Data collection, analysis, and discussion can take a lot of time, so it needs to be clear what question it will help answer, or what decision it will help the group make. Here are four ways in which Working Groups use data:

1. **To identify gaps and opportunities**- data creates a common understanding of where the system is and is not working, as well as where there are opportunities for intervention.
2. **To inform the strategies to be pursued**- the insights from data will be an important puzzle piece as Working Groups design strategies and prioritize among potential interventions.
3. **To learn and course correct-** the collection and evaluation of data throughout the progress of the initiative will allow for both early and continuous "course correction" and learning as Working Groups understand what works and what does not in the strategies rolled out.
4. **To demonstrate impact and remain accountable -** tracking progress over time will enable Working Groups to demonstrate the impact of the work underway, and foster excitement, support, and commitment, and create a mechanism to hold each other accountable.

To ensure Working Groups successfully make use of data, co-chairs can focus on **demystifying data** and **embedding a culture of learning.**

Demystifying data: "Using data" can be intimidating, but it does not need to be; it can be a fulfilling and rewarding activity. Working Groups should focus on identifying the data they need (ensuring it is the right amount and good quality and that they don't let the perfect be the enemy of the good) and then using the insights, results, and emerging questions as part of their conversation and decision-making tools. Moreover, it helps to recognize and celebrate that qualitative data is as powerful and valid as quantitative data. Specifically, Working Groups can try the following activities to "demystify" data and put it to work:

→ ***Clarify what counts as data-*** Many data sources exist – often more than you originally realize:

- Externally collected population-level data (e.g., 3rd grade reading scores, state obesity rates)
- Samples (e.g., birth weights in one hospital, percent of seniors receiving at-home care in a district)
- Community survey (e.g., 100 responses to a survey designed by the Working Group)
- Notes from a focus group conversation, interviews with end-beneficiaries, etc.
- Results from research and evaluation studies

→ ***Engage with data together and creatively -*** people don't engage deeply with data when it is simply presented to them. Find ways to spark interest and insight, for example:

- As a group, brainstorm and determine learning questions that should be answered with data
- Print posters with the data and pin up on the wall, and have the Working Group discuss what it means in small groups
- Share thought-provoking quotes to complement quantitative data and spark discussion

[4] Initiatives often develop a ***shared measurement system (SMS)***, a common set of indicators to monitor the initiative's performance and track its progress toward goals.

Embedding a learning culture: To be successful, Working Groups should be keenly aware of changes in the context, conditions, and circumstances that influence the outcomes of the group's strategies. To create this continuous learning culture, there needs to be an openness to surprise, a willingness to admit "failure", a commitment to continuous improvement, and a hunger and curiosity for feedback and learning about what works. This means that new reports, data, or statistics are not seen as simply "evaluating" or "judging" the activity that has happened, but as the ingredients for the next wave of action. New information needs to be transparently shared, easily digestible, and discussed with a forward-looking mindset. A learning culture optimally allows Working Group members to openly and effectively engage in dialogue and reflection, and challenge and test their assumptions so that new ideas and practices emerge and approaches can be refined. And while learning should always be happening in the Working Groups, the *focus* of learning changes over time. At first, learning is focused on new ways of understanding, seeing, and relationship building within the Working Group; over time the focus is on improving results, course correcting, and evolving the group's work.

T🛈PS

Disaggregate data	- When reviewing data, always try to look past averages and generalities and seek to understand data for different demographic groups
Lead with curiosity	- When working with data in the Working Groups, strive to bring open questions, rather than answers, to the conversation. Exploring questions together will allow members to make connections between data points that illuminate a path forward differently than if they hear "the answer". - Dissect the data together. Instead of saying "*The data tells us we should focus on X*", ask "*As we look at this data, what areas need most attention?*" - Ask Working Group members to bring context to the data that is being presented if it relates to their day-to-day work or personal experiences.
Embrace that plans are supposed to change	- Working Groups grapple with complex problems, so strategy experimentation, learning, and tweaking are crucial parts of their work. - Don't be afraid to be responsive and flexible as new data illuminates further understanding of what (and how) the Working Groups could be focusing on.
Avoid data dumps and analysis paralysis	- Sending lots of data as a pre-read isn't effective if it is not then built into the meetings. It needs to be tied to discussions and decision making. - Data does not make the decision for you, nor will it improve strategies if action is not taken. Put the data to work by using it to shape decisions.
Explore different ways to access data	- Look for opportunities to promote partnerships for data collection, funding, and sharing within the broader community.

🛠OOLS & RESOURCES

Learn more: These resources provide ideas that co-chairs can use in Working Groups:

- Blog series: "What Does it Take to Use Data to Change Behavior in Collective Impact?" (Living Cities)
- Case study: "Evidence-Based Decision-Making- Engaging Parents & Principles to Cure San Antonio's Chronic Absenteeism" (Strive Together)
- "The Three Elements of Continuous Learning: Priorities, Plans, and Culture" and "Building in Continuous Learning into Collective Impact" (Collective impact Forum)
- Community Check Box Evaluation System (University of Kansas)

APPENDIX A Working Group Meeting Planning Steps for Co-Chairs

Before meeting	
Schedule meeting date and location *(schedule 3-4 months of meetings at a time so that members can plan to attend)*	Several months before meetings
Maintain current contact list of Working Group members, including reaching out to members with low attendance	On-going
Ensure someone has sent calendar invites to members for meetings that include location and any directions for parking	3-4 weeks before meeting
Help with creating meeting agenda *(see Appendix B for a template and planning questions for creating a meeting agenda)*	2-3 weeks before meeting
Participate in call with Backbone staff to get feedback on meeting agenda and finalize the facilitation plan (for each agenda item, who is facilitating, who is taking notes, etc.)	1-2 weeks before meeting
Help with the creation of meeting material *(may be a PowerPoint presentation, written memo, copies of reports, etc.)*	1-2 weeks before meeting
Email any pre-read material / meeting reminder to Working Group *(including asking for / reminding of homework assignments)*	3-5 days before meeting
During meeting	
Take attendance	During meeting
Play the role that has been determined in the facilitation plan	
Outline clear next steps at end of meeting for Working Group to agree upon	
Immediately after the close of the meeting	
Take photo of whiteboard / flip charts for reference if needed	Day of meeting if possible
Debrief with backbone staff to capture reactions / next steps	
Write down: 1. Key topics discussed and decisions made in the meeting 2. Questions and who is taking the lead to answer them (i.e. “homework”) 3. Requests for the Steering Committee	
Within a week after the meeting	
Email follow-up to Working Group members with thanks, next meeting date, homework, material, etc. (*See Appendix C for a sample email)*	2-5 days after meeting
Engage in email or phone contact with those who didn’t attend	2-5 days after meeting
Develop report to Steering Committee (*see Appendix D for a sample email*): 1. Key topics discussed and decisions made 2. Progress highlights 3. Requests for Steering Committee 4. Next steps	1 week prior to Steering Committee meeting
Document Steering Committee response to the report (e.g., answers to questions, suggestions, feedback) to share at next Working Group meeting	Within 1 week of Steering Committee meeting

APPENDIX B Working Group Meeting Agenda Template

SAMPLE WORKING GROUP MEETING AGENDA	QUESTIONS TO HELP YOU PLAN THE MEETING
1. **Meeting goals, welcome, introductions** *(10 minutes)* a. Review goals of meeting b. Introductions (if applicable) c. Housekeeping	- *What do we want to accomplish during this meeting?* - *Is there anyone new to the group this month we should introduce?* - *Are there are major developments or elephants in the room that we need to address at the outset of the meeting?* - *What other housekeeping items need to be cleared?*
2. Review *(15 minutes)* a. Decisions made at the last meeting b. Progress since last meeting (including homework contributed and feedback from / action by Steering Committee)	- *What decisions did we make during the previous meeting? (note: this language should be consistent with what you put in the follow up email after the meeting)* - *What are some exciting accomplishments from the past month? (success, anecdotal or quantitative)* - *What can we report back on homework assignments?* - *What can we report back from the Steering Committee meeting?*
3. Discussion *(70 minutes)* a. Overview of key topics to discuss this month b. If applicable, data that informs those topics c. Interactive discussion of the key topic (could be in small groups)	- *What big topics do we have to discuss?* - *What data do we want to bring to these discussions (for example lessons from outreach, new data, findings from initial implementation of ideas, national best practice, guest speaker, etc.)*
4. Decision making *(15 minutes)* a. Noting key decisions b. Agreeing on next steps (homework, asks for the Steering Committee)	- *What is our hypothesis on where the group will land?* - *What challenges do we foresee with this and what can we do now to address these?*
5. Closure *(10 minutes)*	- *What is an inspiring way to end the meeting this week?*

APPENDIX C Meeting Follow-up Email Template - Working Group

Dear [Policy and Advocacy] Working Group members,

Thank you so much to all of you who were able to attend our last meeting. Please find herein the key points discussed, decisions made, questions and requests for the Steering Committee, and next steps. There is also a more detailed list of meeting notes at the end of the email. As a reminder, our next meeting will be on XXXX at XXXX in place XXX.

Key topics discussed and decisions

- We discussed the viability of XXXX strategy in light of XXX. The group decided to investigate the trends in XXXX and have conversations with XXXX before moving forward with the strategy. We will be discussing this topic further during our next meeting.

- Small groups crafted 3 potential policy opportunities at the state level to pursue in 2016 and 2017. These included XXXX, XXXX, XXXX. The group decided to pursue XXXX as a "quick win" opportunity with significant momentum within the legislature this cycle.

Requests for Steering Committee

- The Working Group is **asking the Steering Committee for introductions to XXXX and XXXX** to help with the policy opportunity described above.

Next Steps

The following Working Group members volunteered to take on "homework" assignments to help answer questions that came up during the meeting:

- XXXX will be researching XXXX. She will share high-level findings with us during next month's meeting
- XXXX will bring some data on XXXX to facilitate our conversation about XXXX.

Later this month you will receive the following items as inputs to meeting #_:

- Pre-reads

- Draft final policy XXXX

- XXXX annual report data to analyze together during the meeting

We are so excited to have all of you engaged in this important work. Please don't hesitate to reach out if you have any questions.

Warm regards,

Names of Working Group co-chairs

[Insert high-level summary of meeting notes at the bottom of the email]

APPENDIX D Meeting Follow-up Email Template - Steering Committee

Dear Steering Committee,

We had a successful meeting of the XXX Working Group on [date]. Please herein find the key points and decisions discussed during the meeting, progress made, requests for the Steering Committee, and next steps. There are also more detailed meeting notes at the end of the email.

Key topics discussed and decisions

- We discussed the viability of XXXX strategy in light of XXX. The group decided to investigate the trends in XXXX and have conversations with XXXX before moving forward with the strategy. We will be discussing this topic further during our next meeting.

- Small groups crafted 3 potential policy opportunities at the state level to pursue in 2016 and 2017. These included XXXX, XXXX, XXXX. The group decided to pursue XXXX as a “quick win” opportunity with significant momentum within the current legislative session.

Progress highlights

- Since our last Working Group meeting, we have shared progress on our work with XXX, which resulted in an op-ed being written about our policy priorities in newspaper XXX.

Requests for Steering Committee

- The Working Group is requesting your help with the policy opportunity described above. If any of you have contacts at XXXX or XXXX, we would greatly appreciate an introduction to begin conversations and create our advocacy plan. Please contact abc@abc.org if you have suggestions or follow up thoughts on this matter.
- …

Next Steps

- During the next month, we will be…

We are so excited to have all of you engaged in this important work. Please don’t hesitate to reach out if you have any questions.

Warm regards,

Names of Working Group co-chairs

[Insert high-level summary of meeting discussion / notes at the bottom of the email]

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