How to Lead Collective Impact Working Groups

A Comprehensive Toolkit

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FSG REIMAGINING SOCIAL CHANGE

About FSG

FSG is a mission-driven consulting firm supporting leaders in creating large-scale, lasting social change. Through strategy, evaluation, and research we help many types of actors—individually and collectively—make progress against the world's toughest problems.

Our teams work across all sectors by partnering with leading foundations, businesses, nonprofits, and governments in every region of the globe. We seek to reimagine social change by identifying ways to maximize the impact of existing resources, amplifying the work of others to help advance knowledge and practice, and inspiring change agents around the world to achieve greater impact.

As part of our nonprofit mission, FSG also directly supports learning communities, such as the Collective Impact Forum, Impact Hiring Initiative, and Shared Value Initiative, to provide the tools and relationships that change agents need to be successful.

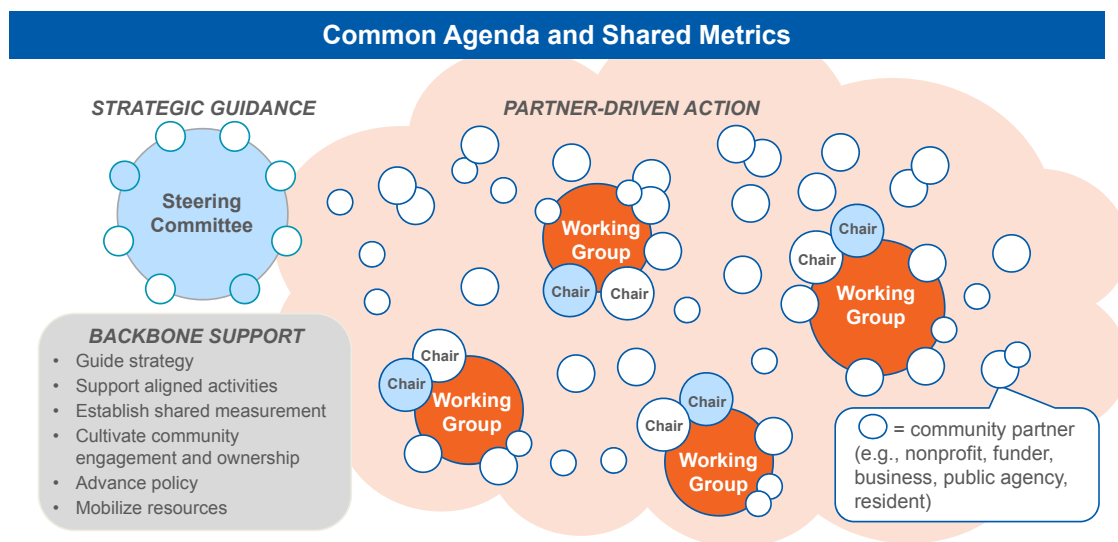Learn more about FSG at www.fsg.org.

CONTENTS

THE CRITICAL ROLE OF WORKING GROUPS AND THEIR CO-CHAIRS

WHY A KIT FOR WORKING GROUP CO-CHAIRS?

As illustrated in Figure 1 below, Working Groups are the heartbeat of collective impact: where action occurs and goals are brought to life. These groups (also called work groups, task forces, community action networks, strategy teams, and a variety of other names) are where practitioners come together to contribute their time, expertise, passions, and lived experiences to help develop and implement strategies. Much has been written about the role of Backbone staff in fostering collective impact. 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. Thus, this kit is dedicated to these co-chairs because without them collective impact would not be possible.

FSG developed this kit for a collective impact initiative funded by the Hampton Roads Community Foundation in Virginia. We are grateful it has encouraged us to share this resource. Moreover, while we created this kit specifically for Working Group co-chairs, the contents may also be helpful for Backbone staff, Working Group members, and co-chairs of any form of collaboration.

FIGURE 1. TYPICAL COLLECTIVE IMPACT STRUCTURES[1]

Common Agenda and Shared Metrics

STRATEGIC GUIDANCE

PARTNER-DRIVEN ACTION

Steering Committee

BACKBONE SUPPORT
- Guide strategy
- Support aligned activities
- Establish shared measurement
- Cultivate community engagement and ownership
- Advance policy
- Mobilize resources

Working Group

Working Group

Working Group

Working Group

Chair

○ = community partner (e.g., nonprofit, funder, business, public agency, resident)

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

WORKING GROUPS AT A GLANCE

WHO?   15 to 25 people[2] who represent key aspects of the system the Working Group is focused on

HOW?   Facilitated by Backbone staff and Working Group co-chairs

WHAT?   Meet regularly[3] to drive implementation by engaging in **3 ACTIVITIES** over time:

1. Determining the **SCOPE** of the Working Group, grounded in data on the local situation (e.g., historical context, assets, and needs) and local or national best practices

2. Developing **STRATEGIES** (see Appendix A for samples), which may include the following:

   • **Better understanding the current situation:** aligning or overlaying existing data sets or systems with one another

   • **Learning by trial:** identifying an opportunity to start small with willing partners, learn from the experience, and then expand or replicate

   • **Increasing coordination:** finding ways to realign existing programs, protocols, and stake-holders to work together differently to maximize efficacy

   • **Enhancing services:** adopting a previously unnoticed proven practice from inside or outside the community to enhance existing services or programs

   • **Identifying policy-change opportunities:** looking for opportunities at local or state levels and relaying these to a Steering Committee and/or a policy and advocacy Working Group

3. Driving the **IMPLEMENTATION** of the strategies by:

   • **Identifying resources** (e.g., community leaders, funding) required to put ideas into action

   • **Inspiring change** in their own organizations and networks in accordance with the strate-gies

   • **Determining how to measure** the Working Group's progress and success

   • **Providing updates** to Steering Committee and community and responding to feedback

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2   Enough people to represent the whole system, but not so many that meetings become unwieldy.

3   We recommend monthly meetings to ensure sustained momentum and progress.

ROLES OF WORKING GROUP CO-CHAIRS

Working Groups typically have 2 to 3 co-chairs, ideally one of whom also serves on the Steering Committee, playing the following 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 in meetings—including speaking up if conversation gets stuck, encouraging multiple perspectives, and reporting out on smaller group discussions

- Contributing to Working Group **member management**—including addressing member concerns outside of meetings or learning more about members' roles and experiences to help inform strategies

- **Nurturing relationships** among Working Group members—including ensuring each member's unique assets and contributions are supported and valued

- Cultivating a **focus on equity**—including seeking diverse membership, fostering conditions for everyone to be included, engaging in community, and using data to understand disparities and develop strategies

- **Serving as a bridge** for the initiative's work in the community—including seeking input from key stakeholders, speaking at community events, and updating community members on progress

HOW TO BUILD 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. Finding effective people to fill the role of Working Group members (including the co-chairs) may be the first big step to achieving impact down the road.

HOW
TO APPROACH IT

Collective impact initiatives create opportunities for many people to be involved through various groups and levels of engagement; Working Group participation is one such opportunity. Being part of a Working Group may create new leadership opportunities for staff or community members, which can be energizing. Here are some helpful characteristics for identifying Working Group members:

CHARACTERISTICS OF ALL MEMBERS *(15 to 25 members)*	ADDITIONAL CHARACTERISTICS FOR CO-CHAIRS *(Typically 2 to 3 co-chairs)*
• Have firsthand experience with the issue (e.g., members of the community, frontline staff of organizations working on the issue) • Are genuinely interested in affecting the issue, including a commitment to reducing disparities in outcomes experienced by key population[4] • Are action-oriented "doers" who commit to attending meetings and reviewing preread materials; for continuity, we recommend a norm of not sending substitutes to meetings • Have the authority and trust to represent and influence their organizations, agencies, peers, and/or neighborhoods	• Can commit time (~2 to 3 hours monthly in addition to regular meetings) • Represent different perspectives among the co-chair group • Are collaborative leaders and facilitators, fostering an inclusive culture rather than serving as the deciders • Are willing and able to perform key tasks (e.g., facilitate meetings, take notes, write meeting synopses, plan meeting agendas, etc.) • Are not simply symbolic leaders; the success of the initiative hinges on the commitment of the co-chairs to pitch in during and between meetings

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4 Reducing disparities in outcomes experienced by key populations may mean focusing on race in some contexts and socio-economic dynamics in others, as well as considering issues of immigration status, sexual identity, language, disability, etc.

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 issues 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. While every community will have different dynamics and assets, the following list provides ideas for identifying Working Group members:

- Hold community-wide meetings or information sessions

- Advertise opportunities at existing community meetings

- Ask Steering Committee members to recommend staff from their organizations

- Recruit one Steering Committee member to serve as one of the co-chairs

- Source names from existing lists of stakeholders that emerged as the initiative formed (interviewees, focus-group participants, actors that may have been identified if an actor mapping was conducted)

MODULE 1 TIP SHEET

MAKE THE CASE	Remember to stress what you are offering to participants in exchange for their expertise, be it an opportunity for professional development, new content knowledge, new connections for their organization, etc.
STRIVE FOR DIVERSITY OF PERSPECTIVES	Actively seek out members from many segments of the community, including those who bring deep issue experience but may not always be heard; for example, residents from neighborhoods that are disconnected from the mainstream, members of the business community, racial and ethnic minorities, youth, and other stakeholders who are not commonly represented in formal change initiatives. It is good to seek out people who may have conflicting perspectives.
ENABLE PARTICIPATION	For Working Group members who are employed in organizations that work on the issue, participating can be considered as part of their day job. For some members, for example community representatives, who are not directly compensated for their time, it will be important to work with the Backbone staff to come up with a system of support, which might include stipends, transportation, translation, training and coaching on working with data or contributing in large group meetings.
CULTIVATE SHARED OWNERSHIP	Once the Working Group begins to take shape, transition from relying solely on the Backbone staff to relying on fellow co-chairs or other members to lead and manage group activities.
ALLOW MEMBERSHIP TO EVOLVE	While an underlying issue 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 changes or new issue expertise is needed, it is possible that Working Group membership will evolve.

MODULE 1 RESOURCES

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

HOW TO PLAN FOR AND RUN AN EFFECTIVE MEETING

WHY
THIS MATTERS

Once Working Group members have been recruited, the goal is to keep them coming back to meetings. Even more important is making sure that the meetings are effectively making progress towards the goals of the group. Co-chairs should see meeting management as crucial to the process of creating impact.

HOW
TO APPROACH IT

Preparation, facilitation, and follow-up are critical to effective meetings. See the Appendices for templates on tactical aspects of running meetings, such as anticipating what strategies might look like, staying on schedule, taking notes, planning the agenda, and summarizing action items. For example, a typical work plan may have a four-part cycle:
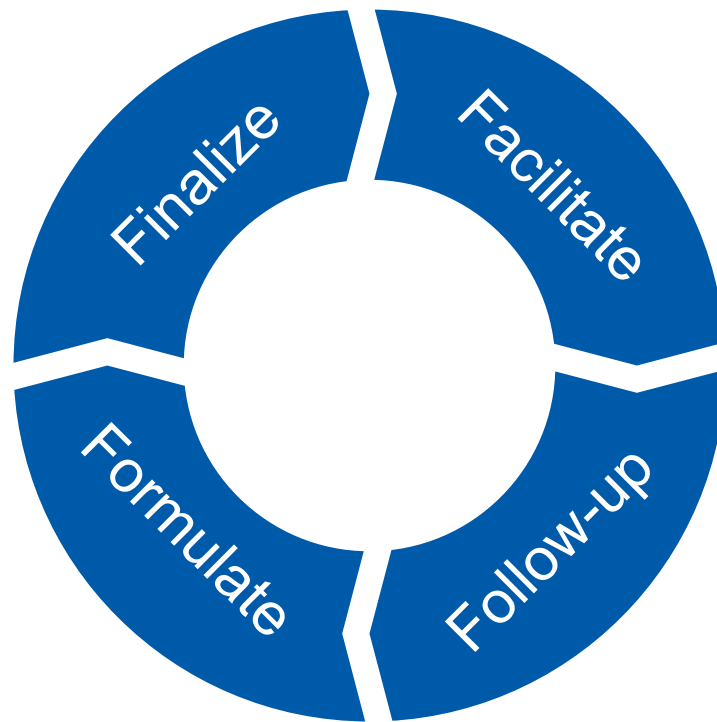
See Figure 2 on the following page for a detailed description of each component of the cycle.

FIGURE 2. TYPICAL WORK PLAN

CO-FACILITATE WORKING GROUP MEETING	• Backbone: take responsibility for overall meeting logistics and flow, and play the facilitation role determined for the meeting. • Co-chairs: play predetermined facilitation role and make note of members who require attention between meetings (e.g., have content expertise, expressed a concern, may benefit from coaching).
FOLLOW-UP, IDEALLY WITHIN A WEEK	• Backbone: synthesize the discussions and decisions from the meeting and send a follow-up email to the Working Group and Steering Committee (see Appendix D and E). • Co-chairs: provide feedback on meeting synthesis and make time to speak with Working Group members who require additional attention.
FORMULATE AGENDA AND CONTENT FOR NEXT MEETING	• Backbone: draft and iterate on agenda and materials for the next meeting (see Appendix B and C). • Co-chairs: provide feedback on the agenda and materials, especially ensuring the group is moving forward at the right pace and flagging parts of the agenda that may be contentious and require careful moderation.
FINALIZE ALL MATERIALS ONE WEEK IN ADVANCE	• Backbone: finalize the content (e.g., data, research, presentation) and facilitation plans for the next meeting. • Co-chairs: volunteer to take on a specific role (e.g., welcome and ice breaker, facilitation of specific agenda items and breakout groups, note-taking, closing).

MODULE 2 TIP SHEET

BE FASTIDIOUS ABOUT WORK PLANNING	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. Good facilitation means it is creative, inclusive, and geared toward decision making.
ACCOMPLISH SOMETHING DURING EVERY MEETING	Make sure there is something to check off or decide on during every meeting, and note these decisions at the end. This drives progress, and it also motivates members to continue their participation with enthusiasm and commitment when 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 plan.

MODULE 2 RESOURCES

We have found the following road map for the first five meetings to be a helpful guide:

Meeting 1: Introduce members, share motivations for participating, discuss how the addressed issue connects to the overall collective impact initiative.

Meeting 2: Identify data (e.g., on the magnitude of the issue, a list of what is working, an actor map of system, etc.) that will help define a concrete scope of work.

Meeting 3: Make sense of the collected data to develop potential strategies for the issue as well as criteria for prioritizing these (See Appendix A for sample strategies).

Meeting 4: Using the criteria and any newly collected data, choose 1 or 2 short-term strategies (likely to deliver results within a year) and 1 or 2 long-term strategies.

Meeting 5: Align on an action plan for short-term strategies (e.g., partners to engage, activities to pursue, measuring results) and next steps for long-term strategies.

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 examples.

- Interaction Institute for Social Change—This organization provides in-person facilitation training with a focus on social change. Their **blog** is a good resource to learn about facilitation and collaboration in the social sector.

HOW TO BUILD A CULTURE OF COLLABORATION

WHY
THIS MATTERS

Working Group members may come from different sectors, communities, and backgrounds. Past collaborative experiences may be limited or even disappointing. There is, however, an opportunity to build a culture of candor and trust in the Working Groups, one where there is respect and commitment to creating positive change. Setting the stage for the Working Group's dynamics and tone is critical and 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 APPROACH 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 develop trust. This trust is a critical ingredient when developing shared goals, strategies, and ownership. Here are some things to keep in mind before, during, and after meetings that will help cultivate a culture of collaboration:

BEFORE

ANTICIPATE TENSION AND USE DIFFERENT TECHNIQUES TO BUILD A PRODUCTIVE ENVIRONMENT

- Anticipate topics that 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.

- Consider and act on ways to give all members equal voice and authority, engaging them differently where appropriate 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 the meeting is not challenging throughout.

DURING

FACILITATE INSPIRING MEETINGS THAT FOSTER CONNECTIONS AMONG PEOPLE

- During the first meeting and throughout, ask questions like, "Why is this work personally important to you?" to provide opportunities to 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 people feel comfortable sharing as part of a group. Respond to these observations live if possible, 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.

MODULE 3 TIP SHEET

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 develops unlikely relationships. Show appreciation for the ideas and perspectives of each member.
AVOID BINARY CHOICES	Provide a spectrum of choices rather than either/or options. For example, instead of choice "A vs. B", provide choices such as "I could live with A if…." Frame difficult decisions as consensus-building rather than a vote, allowing room for give and take.
GIVE THINKING SPACE	Provide space for everyone to think 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	Continually reiterate the value of improving the collaborative *process* (not just the initiative's outcomes) to cultivate camaraderie and shared purpose. Even small changes in mind-sets lay the groundwork for sustained work together.

MODULE 3 RESOURCES

These sample ground rules, which can be customized, may help create constructive conversations:

1. Listen actively and do not interrupt if someone is speaking (allow people to be heard)
2. What is said here, stays here; what is learned here, leaves here (share lessons learned or insights with people who weren't present, while honoring confidentiality)
3. No one knows everything; together we know a lot (recognize each individual cannot possibly have the full picture)
4. Notice your experiences, emotions, and feelings (examine how you are reacting, and do your best to respond mindfully)
5. Speak from the I, not for the group (remember we can only speak from our own experience)
6. We cannot be articulate all the time (note that cognitive functioning can go down when conversations are challenging or stressful, particularly when emotions are involved)
7. Expect and accept a lack of closure (appreciate that you are working to solve complex challenges; fostering an open dialogue may mean building and learning over time)

These relationship-building and small-group conversation exercises can provide valuable opportunities for bonding and creating a more relaxed atmosphere, especially during the first few meetings:

- "**Collective Impact #ToolBox: Icebreakers**" (Living Cities)
- **Moving Beyond Icebreakers: An Innovative Approach to Group Facilitation, Learning, and Action** (Stanley Pollack with Mary Fusoni)
- "**Compendium of useful, purposeful introduction/warm-up/icebreaker exercises**" (Collective Impact Forum)
- **Facilitating Intentional Group Learning: A Practical Guide to 21 Learning Activities** (FSG)

HOW TO PUT SYSTEMS THINKING INTO PRACTICE

WHY
THIS MATTERS

Collective impact is challenging work that requires coordination among players from many sectors, and deep collaboration among people who may tradition-ally 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 APPROACH 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, subsystems, and their parts interact with and influence each other, and how these systems create and contribute to specific problems.[5] This cannot occur without "system thinkers" who, per Peter Senge,[6] embody these characteristics:

1. A willingness to challenge your own mental model—accepting your own role in problems and being open to different ways of seeing and doing

2. Always including multiple perspectives when looking at a phenomenon

3. A consistent and strong commitment to learning

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5 Adapted from **Systems Thinking: How to Lead in Complex Environments**. Robert Bullock, 2013.

6 **http://www.mutualresponsibility.org/science/what-is-systems-thinking-peter-senge-explains-systems-thinking-approach-and-principles**

As a co-chair, it is important to embody these systems-thinker characteristics in how you plan for and show up for meetings. Moreover, over time these characteristics are ideally nurtured in all Working Group members. There are numerous tools co-chairs can use to put the ideas behind systems thinking into practice. Using these tools (see the Resources section in this module for examples), you can help Working Groups members:[7]

SEE THE WHOLE SYSTEM, NOT JUST ITS PARTS

1. Include diverse perspectives.

2. Map the various players and influencers in the system.

3. Understand gaps and opportunities in the system.
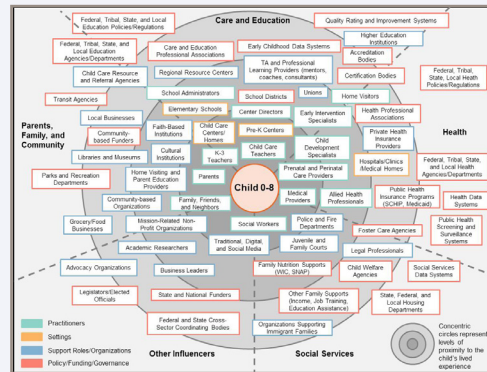
SHIFT THE COLLECTIVE FOCUS FROM REACTIVE PROBLEM SOLVING TO CO-CREATING THE FUTURE

4. Identify the key trends and momentum in the system.

5. Identify the interconnectedness of existing and future collective activities.

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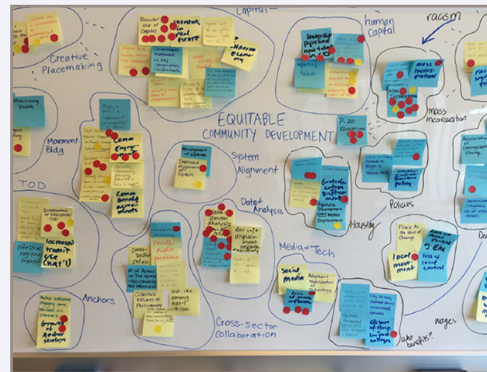
7 Graphic adapted from "**The Dawn of System Leadership**" (2015) Peter Senge, Hal Hamilton, John Kania. *Stanford Social Innovation Review.*

MODULE 4 TIP SHEET

KEEP THE WHOLE SYSTEM AT THE FOREFRONT	Try to move out of the day-to-day mind-set of "what can I do?" and towards "what can we all do together?" This includes avoiding exercises that focus on individual organizations and programs and, rather, designing exercises that stimulate conversation on how working together can help everyone achieve more. It also helps to remind the group of "the big picture," which may be as simple as writing the shared goal of the whole collective impact initiative on a whiteboard during every meeting, or placing it at the top of every agenda.
REMEMBER: IT'S ABOUT THE JOURNEY, NOT JUST THE 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. In other words, the powerful conversations and connections that come from using the tools are critical outputs of engaging in this way.
EMBRACE AND ENCOURAGE 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. Successful systems-thinking exercises allow groups to productively engage with, rather than circumvent, these tensions. In fact, if meetings don't get slightly uncomfortable at times, then the membership likely includes perspectives that are not diverse enough.

MODULE 4 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 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, achieve-ments, 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 function and how systems leaders can problem-solve creatively (Waters Foundation).

HOW TO ENGAGE WITH COMMUNITY MEMBERS

WHY
THIS MATTERS

Engaging and working with a community (or "community engagement")[8] in collective impact is a critical part of creating effective and sustainable strategies to drive change. It is by centering on the wisdom, voice, and experience of community members who are closest to the challenges that collective impact is able to create opportunities for greater equity. Engaging a full range of voices is critical and rewarding, and may also be challenging. The Resource section in this module includes ways to equip co-chairs with the mind-set, vocabulary, and willingness to engage in difficult and deeply necessary conversations.

HOW
TO APPROACH IT

Before launching into specific community-engagement activities, check with the Backbone staff to ensure they fit 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:** Learn about the root causes of the issue and barriers to change

2. **Co-create solutions:** Spark problem-solving rooted in the lived experience of people most directly affected

3. **Verify the direction:** Get feedback on strategies, particularly from those most impacted by implementation

4. **Expand reach:** Spread the word on the initiative and widen the scope of those who will help implement it

5. **Build community capacity to lead change:** Empower community to engage in strategy implementation

See Figure 3 on the following page for specific activities for each goal, at different levels of depth.

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8   While there can be significant differences among 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.

FIGURE 3. MATRIX OF COMMUNITY ENGAGEMENT ACTIVITIES

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 underrepresented populations		Cultivate community partners	
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 and FSG.

MODULE 5 TIP SHEET

INTERROGATE ASSUMPTIONS ABOUT COMMUNITY NEEDS	Unconscious biases may inform our assumptions about the needs and priorities of the various communities involved in a collective impact initiative. Lay assumptions aside and engage community members—early, openly, and frequently—to help guide the Working Group's direction.
TREAT THIS AS A VALUE, NOT AN EVENT	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 valued and acted on), inclusive (culturally competent and respectful interactions), and always inform participants of how their input is used (by sharing insights back with the community).
MAKE IT EASY TO ENGAGE	Keep in mind the realities of those you are engaging: carefully select who extends invites to community members; schedule meetings at convenient times and locations and meet people where they are (this could be at the bus stop or the laundromat); customize materials and facilitation to ensure they are user-centric; and provide food, childcare, transportation, translation, and/or stipends as appropriate.
ONE VOICE DOESN'T REPRESENT THE WHOLE	A community is not one entity. It is made up of many perspectives/sub-communities. Remember that one member of a community or group cannot speak for the whole.

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

MODULE 5 RESOURCES

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)
- "**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 partner-ships can advance equity**" (Living Cities)
- "**Equity and Collective Impact**" (Lumina Foundation)
- "**Putting Community in Collective Impact**" and "**Bringing an Equity Lens to Collective Impact**" (Collective Impact Forum)

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**"

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. Learning from data in an intentional and structured way is essential because it enables assessment of progress towards goals, and catalyzes continuous improvement of strategy. Without data, Working Groups may find themselves "working in the dark": hard at work and committed to impact, yet unable to determine the best path forward or the impact of their actions.

HOW
TO APPROACH IT

While the Backbone staff, the Working Group, and/or local data experts will take the lead on the overall data activities of a collective impact initiative,[9] Working Groups can use data in tangible ways throughout their work. It is important to remember that data are 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 Working Groups may use data:

1. **To identify opportunities**—data create 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**—insights from data can be an important puzzle piece as Working Groups design strategies and prioritize among potential interventions.

3. **To learn and course correct**—the ongoing collection and evaluation of data allow for continuous course correction, 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 enables Working Groups to demonstrate impact, foster excitement, and create a mechanism to hold each other accountable.

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9   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.

As a co-chair, it is important to remember that using data can be intimidating for members of the group, but it does not need to be; it can be a fulfilling and rewarding activity. Start by identifying what data are most needed (balancing a desire for meaningful and quality input with a desire to minimize time and resources required for data collection and analysis), stressing that qualitative data are as powerful and valid as quantitative data, and celebrating that there are likely many existing data sources in the community:

- Externally collected population-level data (e.g., third-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 focus groups or interviews
- Results from research and evaluation studies

Working Groups also need to pay attention to the context and conditions that influence their strategies. To create such a learning culture, co-chairs can foster an openness to surprise, a willingness to admit "failure," and a hunger for feedback. This means that new reports, data, or statistics are not seen as evaluating or judging the activity that has happened, but as the ingredients for the next wave of action. New information can be discussed with a forward-looking mind-set so Working Group members reflect openly and effectively. This ensures a culture that challenges and tests assumptions so new ideas emerge and current approaches can be refined. And while learning can always be happening in the Working Groups, the focus of learning changes over time. At first, learning is focused on new ways of understanding and seeing the issue; over time the focus is on improving results, course correcting, and evolving the group's scope and strategies.

MODULE 6 TIP SHEET

DISAGGREGATE DATA	When reviewing data, look beyond averages and generalities and seek to understand data for different population subgroups. More importantly, if the Working Group is looking at data about different subgroups, yet those subgroups are not part of the discussion, then the group will likely not reach the best conclusions. Ask Working Group members to bring context to the data that are being presented if the data relate to their day-to-day work or personal experiences, and if no one in the group can provide that context, seek out those who can.
LEAD WITH CURIOSITY	Strive to bring open questions, rather than answers, to the conversation; for example, instead of saying, "The data tell us we should focus on X," ask, "As we look at the data, what areas need most attention?"
INCORPORATE A FUN FACTOR	People don't engage deeply when data are simply presented. Find ways to spark interest and insight; for example, print posters with the data and pin them up on a wall, and ask small groups within the Working Group to discuss what the data mean. Moreover, complement statistics with thought-provoking quotes to complement quantitative data and spark discussion.
AVOID "DATA DUMPS" AND "ANALYSIS PARALYSIS"	Sending lots of data as a preread isn't effective if it is not then built into the meetings. Data need to be tied to discussions and decision making. Data do not make the decision for you, nor will data improve strategies if action is not taken. Utilize data to shape decisions.
DON'T REINVENT THE WHEEL OR HOARD IT	Look for opportunities to promote partnerships for data collection, analysis, funding, and sharing within the broader community.
EMBRACE THE FACT THAT PLANS OFTEN CHANGE	Working Groups grapple with complex problems, so strategy experimentation, learning, and tweaking are crucial parts of the work. Don't be afraid to be responsive and flexible as new data illuminate further understanding of what (and how) the group could be focusing on.

MODULE 6 RESOURCES

- 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)

- **Community Check Box Evaluation System** (University of Kansas)

- "**The Three Elements of Continuous Learning: Priorities, Plans, and Culture**" and "**Building in Continuous Learning into Collective Impact**" (Collective impact Forum)

APPENDIX A

SAMPLE WORKING GROUP STRATEGIES

FOCUS OF INITIATIVE	SPECIFIC WORKING GROUP ISSUE AREA	SAMPLE WORKING GROUP STRATEGIES
EARLY CHILDHOOD	Increasing access to high-quality childcare	• Creating a guide in multiple languages of available childcare options, with information including neighborhood, opening hours, ability to offer subsidy, and languages spoken by staff • Creating a common enrollment form among all childcare providers • Conducting a gap analysis to determine which neighborhoods are lacking availability, and advocating for new capacity to be built where needs are highest
ASTHMA	Creating healthier physical environments	• Identifying schools with high levels of allergens and implementing EPA indoor air-quality tools • Working with city inspectors to add environmental questions to day care checklists • Enacting anti-idling policies in areas frequented by children and families • Coordinating high-ozone day programs (flags, billboard warnings) with messages for citizen action, using new technology as possible
JUVENILE JUSTICE	Reducing school-related delinquencies	• Mapping root causes of truancy and early warning signs of absenteeism to create more tailored action plans for at-risk youth • Updating school discipline policies to counteract overreliance on involving law enforcement • Building the capacity of teachers to cope with classroom disturbances to reduce involvement of school resource officers • Connecting schools with high arrest rates to those with low arrest rates to enable shared learning of proven practices
SUBSTANCE ABUSE	Better equipping parents and guardians to raise healthy drug-free children	• Creating and supporting social marketing campaigns geared to parents • Providing research-based parent education to parents/caregivers of children aged 9–18 years • Educating families about the importance of family connectedness, and the role that family dinners can play in nurturing connection
ACHIEVEMENT GAP	Support positive identity and primary language development	• Ensuring social studies, English, science, and other curricula are inclusive and culturally relevant • Ensuring school environments reflect students' cultural and linguistic heritage • Ensuring that schools hire/develop instructional staff and leadership that reflect diversity and language of student population

APPENDIX B

MEETING PLANNING STEPS FOR CO-CHAIRS

BEFORE MEETING	
Schedule meeting date and location (schedule 3–4 months of meetings at a time so 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	Ongoing
Ensure someone has sent calendar invites to members that include meeting location and any directions for parking	3–4 weeks before meeting
Help with creating meeting agenda (see Appendix C for a template and planning questions for creating a meeting agenda)	2–3 weeks before meeting
Participate in call with Backbone staff to discuss agenda and 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 preread material/meeting reminder to Working Group (including asking for or reminding of homework assignments)	3–5 days before meeting

DURING MEETING	
Take attendance	
Play the role that has been determined in the facilitation plan	During meeting
Help ensure an inclusive environment where everyone can participate	
Outline clear next steps at end of meeting for Working Group to agree upon	

IMMEDIATELY AFTER CLOSE OF MEETING	
Take photo of whiteboard/flip charts for reference, if needed	
Debrief with Backbone staff to capture reactions and next steps	Day of meeting
Write down: 1. Key topics discussed and decisions made in the meeting 2. Questions and who is taking the lead to answer them 3. Requests for the Steering Committee	

WITHIN A WEEK AFTER MEETING	
Email follow-up to Working Group members with thanks, next meeting date, homework, material, etc. (See Appendix D for a sample email)	2–5 days after meeting
Contact those who didn't attend or may need follow-up	2–5 days after meeting
Develop report to Steering Committee (see Appendix E 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 C

MEETING AGENDA TEMPLATE

SAMPLE MEETING AGENDA	QUESTIONS TO HELP YOU PLAN THE MEETING
1. Meeting goals, welcome, introductions *(10 minutes)* • Review goals of meeting • Introductions (if applicable) • Task management	• What do we want to accomplish during this meeting? • Is there anyone new to the group we should introduce? • Are there major developments or elephants in the room that we need to address at the outset? • What other tasks need to be cleared?
2. Review *(15 minutes)* • Decisions made at last meeting • 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 last 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)* • Overview of key topics to discuss this month • If applicable, data that inform these topics • 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 (e.g., lessons from outreach, new data, findings from initial implementation of ideas, national best practice, story from a community member or guest speaker, etc.) • How should we facilitate the discussion to ensure inclusivity?
4. Decision making *(15 minutes)* • Noting key decisions • Agreeing on next steps (homework to be done before the next meeting, what we want to share or ask of 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 them?
5. Closure *(10 minutes)*	• What is an inspiring way to end the meeting?

MEETING FOLLOW-UP EMAIL TEMPLATE—WORKING GROUP

Dear XXX Working Group members,

Thank you so much to all of you who attended our last meeting. Below please find 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. The meeting materials are all attached to this email. As a reminder, our next meeting will be on XXX at XXX in location XXX.

Key topics discussed and decisions

- We discussed the viability of XXX strategy in light of XXX. The group decided to investigate the trends in XXX and have conversations with XXX 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 2017. These included XXX, XXX, and XXX. The group decided to pursue XXX 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 XXX and XXX 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:

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

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

- Prereads
- Draft final policy XXX
- XXX 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 E

MEETING FOLLOW-UP EMAIL TEMPLATE—STEERING COMMITTEE

Dear Steering Committee,

We had a successful meeting of the XXX Working Group on [date]. Below please find the key points and decisions discussed during the meeting, progress made, requests for the Steering Committee, and next steps.

Key topics discussed and decisions

- We discussed the viability of XXX strategy in light of XXX. The group decided to investigate the trends in XXX and have conversations with XXX 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 2017. These included XXX, XXX, and XXX. The group decided to pursue XXX 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 strategies in newspaper XXX.

Requests for Steering Committee

- The Working Group is requesting your help with the policy opportunity described above. If any of you has contacts at XXX or XXX, 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 …

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

NOTES

FSG REIMAGINING SOCIAL CHANGE

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