



COLLECTIVE IMPACT FORUM



Welcomes you to the

Fall 2017 Collective Impact Online Training Series



Welcome from the Collective Impact Forum

- Join the Collective Impact Forum: collectiveimpactforum.org
- Download today's presentation at the Collective Impact Forum
- We want to hear from you! Keep close to your computer to answer polls and ask questions



Robert Albright,
Director,
Collective Impact Forum

Poll:

How many people are watching today's webinar at your location?



Thank you for joining

Join the conversation

1

Ask a question

Send questions via the white Q&A box on your screen.

2

Share on Twitter

#collectiveimpact
@CIForumTweets
@FSGtweets

Technical assistance

E-mail support@blueskyelearn.com

Welcome to our presenter!



Paul Schmitz,
*Collective Impact
Forum, and Leading
Inside Out*

Today's Training

Making Meetings Work:

How to design meetings to energize rather than bore

What's Wrong?

Why do meetings suck?

Share in the comment box a specific challenge for your meetings.

Feedback to Plan

Facilitated conversation with whole group, met individually with members

- Too much info: we should curate information to provide what is most necessary and important
- Too siloed: We need to break down siloes among our 4 goal areas/work groups
- Lots of reporting, little engagement: We should better engage the brain power in this room to advance our work
- Power Dynamics: Meetings dominated by a few people, those with authority
- No Follow Up: We need to have more accountability to ensure decisions and work we do is followed up on

Principles of Design

- Role and Expectations Clarity
- Composition and Room
- Purpose and goals
- Curate what people need, not what you need
- Engage full brain power
- Time Management
- Commitments = Accountability
- Prepare, debrief, evaluate, follow up

Roles & Responsibilities

Ask people what will support success and what will contribute to failure of the team?

Draft Purpose, roles, and responsibilities for teams.

Build consensus on them, then commitment to them.

Ask members to sign their commitment.

Purpose: The Operations Team translates the 2020 goals into data-driven and evidence-based operational initiatives and programs. The Operations Team coordinates, supports, and oversees those initiatives to ensure progress on the 2020 goals.

Membership: Network leaders from all four goal areas, Goal Managers, staff who represent key Executive or Leadership Council decision makers, and individuals selected for their unique perspectives or access to resources. Individuals with specific subject matter or community expertise may be invited for limited periods of time.

Roles and Responsibilities:

- Provide feedback, approve, operationalize, and prioritize strategies that emerge from networks, ensuring rigor and result-based progress on our goals
- Connect dots and align strategies and programs among the four goal areas
- Review grant proposals that emerge from the four goal areas to ensure they are robust, strategic, and directly influence 2020 goals [Provide feedback to Goal Managers and to the Funders Collaborative as appropriate on grant ideas emerging from networks]
- Work with Goal Managers and networks to identify public policy issues and advocacy needs that Initiative should pursue to achieve our goals
- Ensure that big strategic decisions are grounded in implementation realities and the actual lives of children and families
- Identify and work through conflicts, competing interests, and other strategic barriers that prevent progress on our 2020 goals
- Capture, communicate, and harvest learning from stories of success and impact.
- Share the inevitable challenges, mistakes, and failures that will happen in pursuit of our goals so we may continuously learn, improve, and adapt to advance toward our 2020 goals
- Fulfill commitments to progress on agreed upon strategies, programs, and results, and hold networks, staff, and partners accountable for our commitments.
- Communicate to Executive Council, Leadership Council, and networks relevant information to ensure broad commitment to and engagement in our strategies
- Champion and advocate for Initiative with organizations and audiences connected to Initiative, utilizing consistent messaging.

Facilitation Role

- Intentional/Transparent
- Hold neutral
- Hold appreciative openness
- Paraphrase back
- Stand by Flip Chart and chart the work or Delegate
- Keep an eye on the clock
- Distinguish from Authority Role

The Room



One Example

Pre-

Wireframe (annotated agenda); Results, agenda on wall; Tables of 4-6; Assigned seats with table tents; Formal leaders welcome; Facilitator and recorder rolls neutral

15 min

1. Welcome, Initiative Result, Meeting Results, Agenda review, Accountability on commitments, check ins

20 min

2. Two teams report out: 5 Slides, 10 Minutes: (a) goals/strategies, (b) progress headlines, (c) challenges, (d) a story; and (e) 1-2 questions for group consult (can send brief in advance)

25 min

3. Peer Consult: Assign questions to tables for 15 minute consults, 10 minute group conversation and commitments

45min

4. Strategy/Alignment Conversations. Staff/chairs identify 1-2 big questions for group to work on. Table work, report outs, commitments

15 min

5. Commitments/Follow Up: (a) What by whom by when; (b) Implications for other groups to be shared; (c) Review the meeting goal

Wireframe

<p>SET UP</p>	<p>AGENDA and GOALS FOR THE DAY already written on flip chart paper and hung with 2020 Goals</p> <p>Communications Packets and Roles and Responsibilities handouts in piles at center of each table.</p> <p>Seats Assigned with name tents</p>	<p><i>Paul will arrive by 10 AM to meet with Dave and support set up of the room.</i></p>
<p>1. OPENING/GOAL</p> <p><i>Demonstrate progress on action commitments from last meeting, orient to agenda and results for this meeting</i></p> <p>10 Min</p> <p>Begin by 11:35 AM latest; Finish by 11:45 AM</p>	<p>Director: Call to order. Welcome Group</p> <p>In order to advance our 2020 goals, our results for today are:</p> <ol style="list-style-type: none"> (1) Completed Roles and Responsibilities (2) Supportive feedback on Goal 2 ((3) Guidance on the Roadmap (4) Guidance on Data Council Recommendations <p>Facilitator: Review Commitments from last meeting. Last meeting we had follow up work on four items:</p> <p>(1) Manager 1 received feedback he has used to...</p> <p>(2) Manager 2 received feedback he has used to...</p> <p>(3) We received feedback on our communications package. We are excited to share the final version with you today.</p> <p>(4) We received feedback and revised the Roles and Responsibilities document we sent you shortly after the meeting and share again today. Call on Director</p> <p>Director: Acknowledge that feedback from the group was incorporated into this version. Ask for affirmation from the group that they support the Roles and Responsibilities.</p>	<p><i>Goals written on sheet hung in room</i></p> <p><i>Have communications packages on the tables.</i></p> <p><i>Handouts of Roles</i></p>

Wireframe

	Acknowledge you will be adding some new members to the group and that this will be used in recruitment and orientation.	<i>and Responsibilities on tables</i>
<p>2. GOAL REPORTS AND PEER CONSULT</p> <p><i>Update group on Goals 2 & 4, engage members across siloes to support goals.</i></p> <p>45 Min</p> <p>Begin by 11:45 Peer Consult by 12:05 Review Peer Consult by 12:20 Finish by 12:30</p>	<p>Facilitator will introduce Manager 3.</p> <p>Manager 3 (goal 2) & Manager 4 (goal 4) will each have 10 minutes to update the group and frame their <u>question for peer consult</u>. They will have 5 slides each that are on a timer and they will be done on time</p> <p>Facilitator will assign tables to work on a specific question. They will have 15 minutes at tables to identify ways they can help the Goal Managers advance their work.</p> <p>Facilitator will ask each table to share their recommendations and support with Tim and Jonathan. He will summarize what is recorded.</p> <p>Goal Managers will each say thank you to the group and commit to following up.</p>	<p><i>Paul will help Facilitator manage slides and time.</i></p> <p><i>Paul will create a slide with the questions that will show both at the end.</i></p> <p><i>Recommendations and support should be noted on flipchart with names by Selma.</i></p>
<p>3. STRATEGY/ALIGNMENT CONVERSATIONS</p> <p><i>Review</i></p> <p>45 Min Begin by 12:30 PM</p> <p>Move to second topic by 12:55 PM Complete discussion by 1:20 PM latest</p>	<p>Facilitator will introduce <u>First Topic: The Roadmap</u>. He will introduce Director</p> <p>Director will provide context (ladder of inference) for how they got here (let people know how this builds upon their past work, is not new).</p> <p><u>Questions for the group:</u> (1) The contributing indicators ought to be where the work of Initiative happens. Will focusing on these contributing indicators help initiative and its partners better define, measure, manage and improve the work needed to advance our mission?</p>	<p><i>Questions will be on slide</i></p>

Evaluate

Meeting Goals: In order to advance our 2020 goals, our results for today are:

- (1) Test a new meeting format to increase engagement, commitment, and accountability
- (2) Develop roles and responsibilities for the Operations Team
- (3) Receive updates and provide feedback that will advance the work of Goal 1 (kindergarten readiness), Goal 3 (college/career access and success), and the Communications Team.

Answer these questions on scale of 1 (not at all) to 5 (Very much)

Did the meeting achieve its stated goals?

1 2 3 4 5

Comments:

How did the new meeting format work overall? Did you think it made better use of your time to advance our collective work?

1 2 3 4 5

Comments:

Did the format work for Goal 1 and 3 Reports in terms of providing sufficient, relevant, and important information on their work?

1 2 3 4 5

Comments:

Did you find the Peer Consult a useful and constructive use of time?

1 2 3 4 5

Comments:

Was the Roles and Responsibilities and Communications Plan discussions productive?

1 2 3 4 5

Comments:

ANY OTHER FEEDBACK OR IDEAS FOR STRENGTHENING OUR WORK TOGETHER?

Follow Up

agreed to schedule a November meeting to discuss high leverage strategies and tactics for inclusion in the work plan. **Please complete the doodle poll by Thursday, October 20:** <http://doodle.com>

Action Commitments

Who needs to take action?	What actions will move the group forward?	When will the process start and end?	Why is this action a priority?
A & C	<ul style="list-style-type: none"> Follow-up with on release 	Nov. 1	<ul style="list-style-type: none"> To inform his report on the release
P & A	<ul style="list-style-type: none"> Gather information on process of bill passing 	By December meeting	<ul style="list-style-type: none"> To learn how to implement similar policy reform in
W & C	<ul style="list-style-type: none"> Follow-up on ask to County Judge 	Next November meeting	<ul style="list-style-type: none"> For supporting the LAW eviction legal counsel project
Staff	<ul style="list-style-type: none"> Compile list of new state senators/assembly after November election Create baseline report for each of the strategies (including data and what has worked in other locations) Share list of prematurity factors and disparities at next meeting to do strategy activity Schedule November committee meeting 	November 15 October 31 November 1 October 21	<ul style="list-style-type: none"> To re-engage state policymakers To continue work on identifying strategies

Thanks!

Design Factors

- Role and Expectations Clarity
- Composition and Room
- Purpose and goals
- Curate what people need, not what you need
- Engage full brain power
- Time Management
- Commitments = Accountability
- Prepare, debrief, evaluate, debrief

Go back to your initial list, what are elements you can incorporate to design better meetings

How it works



Marcia Blackman,
*United Way of Greater
Milwaukee & Waukesha
County*



Dave Celata,
*Milwaukee Succeeds,
Greater Milwaukee
Foundation*

Thank You to our Presenters!



**Marcia
Blackman,**
*United Way of
Greater Milwaukee &
Waukesha County*



Dave Celata,
*Milwaukee
Succeeds, Greater
Milwaukee
Foundation*



Paul Schmitz,
*Collective Impact
Forum, and Leading
Inside Out*



Continue Your Journey through our Fall 2017 Online Training Series

Moving from Vision to Implementation: Strategies for Systems Change in Collective Impact

October 26, 2017

Sustaining Collective Impact

November 13, 2017

Using Data for a Collective Impact Refresh

December 6, 2017



Join the Collective Impact Forum – A Free Online Community for Collective Impact Practitioners, Partners, and Funders



[ABOUT US](#)

[PROFILE DIRECTORY](#)

[BLOG](#)

[LOGIN](#)



[WHAT IS COLLECTIVE IMPACT](#)

[GETTING STARTED](#)

[FEATURED STORIES](#)

[COMMUNITY](#)

[RESOURCES](#)

[NEWS & EVENTS](#)

Welcome to the **COLLECTIVE IMPACT FORUM**

This is the place for those practicing collective impact to find the tools, resources, and advice they need. It's a network of individuals coming together to share experience and knowledge to accelerate the effectiveness and adoption of collective impact.

[LEARN ABOUT THE COMMUNITY](#)

Visit Our Community

Select your role to visit the collective impact community most relevant to you.



[FUNDER OF INITIATIVES](#)



[BACKBONE ORGANIZATION](#)



[PARTNER ORGANIZATION](#)

Sign up at

www.collectiveimpactforum.org