Collective Impact Funder Community of Practice: In-Person Meeting | September 28, 2017

PREPARED FOR: COLLECTIVE IMPACT FUNDER COMMUNITY OF PRACTICE PARTICIPANTS
I. Introduction and Warm Up Activity

II. Overcoming Your Greatest Challenges in Funding Collective Impact

III. “Ignite” Presentations: Findings from the Funder Openness Action Learning Lab

IV. World Café Discussion of Major Themes from Action Learning Projects

V. What, So What, Now What

VI. Wrap Up and Next Steps
Highlights from Last Night

Six degrees of Carol Lavoie Schuster

Twins abound in the COP!
(am I missing anyone???)

Campbell Soup warehouse coming, to employ 160

*Posted On Thu. Apr 20th, 2017  By: The Courier*

Campbell Soup Supply Co. will start construction of a 741,000-square-foot warehouse on Findlay’s north end by June.
## Agenda for Today’s CI Funder COP Meeting

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Goals of the Collective Impact Funder Community of Practice

- **Networking and building relationships** with other funders of collective impact

- **Learning about the strategies and nuances for funders engaging in collective impact**, and how to most effectively engage in and support collective impact

- **Improving the practice of grantmakers** as funders and partners in collective impact
Since Mid-2014, the CI Funder COP Has Offered Meetings and Peer Learning Calls on Topics Such as Community Engagement, Equity, Funder Alignment, and Leadership

**2014**
- **Sept. 2014:** 30+ COP participants join first large group learning call

**2015**
- **Feb. 2015:** Second in-person COP meeting (DC): ~50 orgs now in the COP
- **May 2015:** Second annual CI Convening (New Orleans)

**2016**
- **Feb. 2016:** Fourth in-person COP meeting (DC)
- **Sept. 2016:** Fifth in-person COP meeting (Chicago)
- **May 2016:** Fourth annual CI Convening (Boston)

**2017**
- **Feb. 2017:** Sixth in-person COP meeting (DC)
- **Sept. 2017:** Seventh in-person COP meeting (Chicago)

- **May 2014:** COP launches at first annual CI Convening (Aspen)
- **Nov. 2014:** 40 attendees at first in-person COP meeting (Seattle)
- **Oct. 2015:** Third in-person COP meeting (Chicago)
- **June 2016:** Third annual CI Convening (Seattle)
# Topics of Interest for the Community of Practice to Explore

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*Lower-priority topics were funder collaboration, policy change, and funder roles*

Source: July 2017 CI Funder COP Survey; Notes: 1) n = 24 total respondents to this survey question. 2) After choosing their top three topics, respondents were then asked to rate which of these topics was their “top choice” that they were most interested in discussing.
Warm Up Activity

Mark Sedway
I. Introduction and Warm Up Activity

II. Overcoming Your Greatest Challenges in Funding Collective Impact

III. “Ignite” Presentations: Findings from the Funder Openness Action Learning Lab

IV. World Café Discussion of Major Themes from Action Learning Projects

V. What, So What, Now What

VI. Wrap Up and Next Steps
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What do we mean when we say “funder openness”?

**Funder openness** is the process by which funders...

- Share their goals and strategies
- Share how they make decisions and measure progress
- Listen and engage in dialogue with others
- Make space for co-creation that builds greater buy-in in the community
- Act on feedback they hear from grantees and from the community
- Share what they themselves have learned
- Promote sharing between funders and grantees (funder-to-funder, grantee-to-grantee, funder-to-grantee)

*Funder openness is focused both externally and internally: sharing externally what funders are learning from engaging in dialogue with others, and changing actions and culture internally through continuous learning*

Source: Adapted from the Fund for Shared Insight’s “Increasing Foundation Openness” RFP
**Openness** in the context of collective impact is proactively engaging in all parts of the openness “loop” identified below:

- **Feedback from Beneficiaries and Grantees**
- **Transparency About Funder Decision Making Processes, Progress, and Lessons Learned**
- **Organizational Learning**
About the Fund for Shared Insight and openness grantees

• Collaborative effort among funders that pools financial and other resources to make grants to improve philanthropy

• Emerged from a belief that foundations will be more effective and make an even bigger difference in the world if they are more open – if they share what they are learning and are open to what others want to share with them, including grantees and the people they seek to help

• In July 2016, Shared Insight provided grant funding to 10 national organizations to increase funder openness. FSG is among the Shared Insight grantees, as part of its field-building partnership with the Aspen Institute on the Collective Impact Forum
The Collective Impact Forum’s funder openness project includes an “Action Learning Lab” and knowledge sharing with other funders in our network.

We will share learning from the Action Learning core group with a broader audience of funders, including the COP and other funders in our network.
Four private foundations, three United Ways, and one community foundation are participating in the Action Learning Lab.
Objectives for the Action Learning Lab

• **Improving openness knowledge:** Improve understanding of community engagement, continuous learning, and other topics related to funder openness that the Collective Impact Funder Community of Practice (COP) has been discussing.

• **Advancing openness practice:** Identify a practical action learning project that you will work on throughout the 12-month Action Learning Lab, bringing unique value to your organization, grantees, and other collective impact partners.

• **Deepening peer relationships:** Build relationships with other funders who are investing in collective impact and are seeking to advance their openness practices.

• **Sharing insights with the field more broadly:** Sharing lessons learned from the Action Learning Lab with the CI Funder COP, attendees of the annual field-wide Collective Impact Convening, and other funders in the Collective Impact Forum’s and FSG’s network.
Key activities of the Action Learning Lab from Fall 2016 to Fall 2017


- **Four group calls over 12 months** to provide peer support and go deeper on openness topics (e.g., transparency, building trust)

- **Survey of grantees and partners (November 2016)** asking about importance and effectiveness each funder’s openness practices

- **Pursue an “action learning project”** in their community
  - Opportunity to **experiment with new practices (or changes to existing practices)** that address one or two funder openness practices
  - Develop an action learning project that is **ideally within the context of collective impact investment(s)**
  - Find ways to incorporate the action learning project into ongoing work (i.e., not limited to a one-time community meeting)
About Today’s “Ignite” Presentations from the Action Learning Lab Participants

• **What is “Ignite”?** An engaging and concise presentation format where a presenter speaks while slides advance automatically. This format ensures all presentations are the same length and that presenters don’t use text-heavy slides.

• **How are we using Ignite?** Each team will appoint one person to present up to 10 slides, 24 seconds per slide (automatically advancing), 240 seconds total (for a maximum of 4 minutes per presentation). Topics for each presentation include:
  • **Background context** about you (the funder), your community, and the collective impact initiative(s) you support
  • **Findings from your grantee/partner survey** and any other research / conversations you had to inform your action learning projects
  • **About your Action Learning project**: what you did over the past 9-10 months, based on community feedback
  • **Lessons learned** from your Action Learning Project
• Findlay-Hancock County Community Foundation and United Way of Hancock County (Brian Treece)
• Institute of Mental Hygiene (Kanitra Charles)
• Ontario Trillium Foundation (Jen Roynon)
• Robert R. McCormick Foundation (Bill Koll)
• The Rider-Pool Foundation (Ron Dendas)
• United Way of the Greater Lehigh Valley (Marci Ronald)
• United Way of the Greater Triangle (Nick Allen)
Ignite Presentations
Several Themes Emerged from the Action Learning Projects

- **Listening Before Acting:** Before changing openness practices, funders must first *listen* to what grantees and community members need the most.

- **Building the Capacity for Community Engagement:** Funders recognize the need for authentic community engagement, but different approaches require intentional capacity building for funders, grantees, and community members.

- **Increasing Transparency:** Increasing transparency requires time and effort, comfort with risk-taking, and a genuine sense of responsibility by funders.

- **Building Trust:** Effective communication requires building (or strengthening) relationships and trust among funders, grantees, and community members.

- **Sustaining Openness:** Funders should embed their openness practices into what they do on an ongoing basis to avoid “snapping back” to old habits.

*Go to pollev.com/cif2017 to select one theme that you would most like to discuss in more detail with your funder peers after lunch.*
Lunch

Informal peer discussions by funder role; Re-convene at 1:15
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VI. Wrap Up and Next Steps
World Café Discussion, Organized by Three Primary Themes That We Discussed before Lunch

- What is **challenging** with this particular theme about funder openness?

- What is **working well** with addressing the challenge(s) you mentioned above?

- What specific **tools and strategies** should we share with other funders who are interested concrete advice about this aspect of funder openness?

*Rotate to a new theme every 20 minutes (building on what the group discussed before you). After rotating through all three themes, we’ll take a break and then come back to debrief*
Networking Break

Reconvening at 3:00pm
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WHAT: What did you notice from the World Café discussion? What facts or observations stood out?
• 3 min self-reflection
• 5 min paired discussion
• 10 min large group debrief

SO WHAT: What patterns or conclusions are emerging? What hypotheses can we make?
• 3 min self-reflection
• 5 min paired discussion (with a new partner)
• 10 min large group debrief

NOW WHAT: What actions make sense for me individually and organizationally regarding my openness practices? What actions make sense for the broader COP in sharing with the field what we’ve learned?
• 3 min self-reflection
• 5 min paired discussion (with a new partner)
• 10 min large group debrief
Suggestions for Sharing Findings

Target Audience
- With your CI Funder COP colleagues
- With your co-workers and other funder colleagues
- With a wider audience of funders elsewhere

Media Formats / Channels
- White paper and deep dive case studies
- Blog series (?)
- Webinar (?)
- Conference presentations (?)

Timeline
- October 23: COP group call to discuss findings
- November/December: Document key findings
- Early 2018: Disseminate findings
- April 2018: Share insights at 2018 Collective impact Convening and other Spring 2018 conferences

What are your reactions to the proposed audience, format, and timeline?
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What Topics Would You Like to Discuss in More Detail in Future COP Calls and Meetings?

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Special Opportunity for COP Members: Collective Impact Coaching and Technical Assistance

Do you need support building your capacity or your grantees’ capacity to effectively implement collective impact? Are you looking for help making the case to other funders and partners about the impact of collective impact? If so, we are available to provide customized coaching for you, your grantees, and your collective impact partners.

Collective Impact Coaching Services

- **1-2 customized in-person workshops** on topics relevant to the stage and needs of your initiative, such as the how-to of collective impact
- **1-2 webinars** that are uniquely tailored and focused on how-to topics of your choice, such as evaluating collective impact and backbone roles
- **Weekly or bi-weekly one-hour coaching calls** to go deep on context-specific questions and situations that your initiative is working through
- **1-2 hours per week of in-depth review on collective impact materials**, such as steering committee agendas and draft common agenda documents

“We hired the Collective Impact Forum to strengthen our collaborative as a whole. They were tremendously helpful in offering guidance.”

Coaching Client Testimonial

**Talk to me after the meeting if you’d like to learn more**
Join Us at 4:30pm at Tavern at the Park (~5 Min Walk Away) for an Optional Happy Hour

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