<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Item</th>
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<tbody>
<tr>
<td>1:00-1:20pm</td>
<td>Welcome, Objectives, and Introductions</td>
</tr>
<tr>
<td>1:20-1:25pm</td>
<td>Brief Primer on the Key Concepts of Collective Impact</td>
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<tr>
<td>1:25-3:00pm</td>
<td>Engaging Your Board of Directors in Support of Collective Impact</td>
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<tr>
<td>3:00-3:15pm</td>
<td>Break</td>
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<tr>
<td>3:15-4:30pm</td>
<td>Peer Assists: Organizational Implications of Investing in Collective Impact</td>
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<tr>
<td>4:30-5:00pm</td>
<td>Large Group Discussion and Next Steps</td>
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Please Introduce Yourself to the Full Group

• Name

• Role

• Organization

• Your stage of investing in collective impact
  - Early Stages (1-2 years)
  - Mid Stages (2-3 years)
  - Late Stages (3+ years)

• Why you chose to attend today’s CI Funder COP leadership pre-meeting
  *(in 2 sentences or less!)*
I. Brief Primer on Key Concepts of Collective Impact

II. Board Engagement and Buy-in

III. Peer Assists: Organizational Implications of Investing in Collective Impact
There Are Several Types of Problems

**Simple**
- **Baking a Cake**

**Complicated**
- **Sending a Rocket to the Moon**

**Complex**
- **Raising a Child**

*Source: Adapted from “Getting to Maybe”*
Collective Impact is the commitment of a group of important actors from different sectors to a common agenda for solving a specific social problem at scale.
Achieving Large-Scale Change through Collective Impact Involves Five Key Elements

| Common Agenda          | • Common understanding of the problem  
                          | • Shared vision for change  |
|------------------------|---------------------------------------|
| Shared Measurement     | • Collecting data and measuring results  
                          | • Focus on performance management  
                          | • Shared accountability  |
| Mutually Reinforcing Activities | • Differentiated approaches  
                                 | • Willingness to adapt individual activities  
                                 | • Coordination through joint plan of action  |
| Continuous Communication | • Consistent and open communication  
                                 | • Focus on building trust  |
| Backbone Support       | • Dedicated staff  
                          | • Resources and skills to convene and coordinate participating organizations  |

Source: Channeling Change: Making Collective Impact Work, 2012; FSG Interviews

An Initiative of FSG and Aspen Institute Forum for Community Solutions
Eight Principles of Practice Are the “How” of Collective Impact

1. Design and implement the initiative with a priority placed on **equity**
2. Include **community members** in the collaborative
3. Recruit and co-create with **cross-sector partners**
4. Use **data** to continuously learn, adapt, and improve
5. Cultivate **leaders** with unique system leadership skills
6. Focus on **program and system strategies**
7. Build a culture that fosters **relationships, trust, and respect** across participants
8. Customize for **local context**
I. Brief Primer on Key Concepts of Collective Impact

II. Board Engagement and Buy-in

III. Peer Assists: Organizational Implications of Investing in Collective Impact
Building Support for Collective Impact with Board Members

- **Using data** to show that what the foundation has been doing in the past has not led to results at scale and why collective impact can help.

- **Highlighting successful collective impact examples** from elsewhere.

- **Educating Board members about the type of change they should expect to see** (civic infrastructure, system change, and ultimately population level change) and likely timelines for change (short-term, intermediate, and long-term).

- **Identifying champions on the Board** who can vouch for the importance of investing in systems change through collective impact.

- **Helping Board members understand the spectrum of ways that funders can invest in collective impact** (e.g., convening, supporting backbone infrastructure, aligning grants with other funders).

*What other Board engagement strategies come to mind for you?*
A Perspective on Board Buy-In:
Marci Ronald, United Way of the Greater Lehigh Valley

Marci Ronald
Executive Vice President
United Way of the Greater Lehigh Valley
A Call to Collective Impact
Board Engagement and Commitment

Marci Ronald, Executive Vice President
September 28, 2016

United Way of the Greater Lehigh Valley
Background and Context

- UWGLV ranked as Metro 1A, Business Performance Matrix 3C; recently added a new county, serving 3 county region
- Positioned for regional growth
- Experienced 5 year decline in resource development, but significant growth in last 4 years (9.8% increase in 2015, $12.5M RUM)
- Conversion from allocations to impact in 2008
- 10+ years of coalition building, focused initiatives on specific areas and goals
- Two areas: education and healthy aging, received significant local, state, and national attention—early adopter in community schools initiative and dedicated staff to “systems” change for many years
- Significant commitment and contribution to launching and supporting place-based Promise Neighborhood work
- Have studied and infused principles of Collective Impact into UWGLV work since 2012, especially common measures
Environmental Conditions

- 2014 as pivotal year: new leadership, emphasis on high performing organization, measurable impact goals, clarity on role and relevance to community
- 1400+ nonprofit organizations in LV and growing concern over duplication of efforts, inefficiency, and minimal impact despite multitude of resources
- Growing knowledge and conversations about Collective Impact as a concept and practice and UW’s role
- Increased understanding at board level of complexity of social issues, UW’s limited capacity and need to solve at a bigger level
- One donor.....
Case for Support

- Uniquely qualified
- Trust and credibility
- Donors asked us to play a leadership role
- Expertise and passion
- Strong financial position
- Help advance mission/vision
The Commitment

- $500,000 commitment from reserves over 3 year period
- Vague details about where this might go, with commitment to convene group of stakeholders to discover our role, what community needs the most
- Shift in roles to increase leadership and visibility, build internal capacity especially in data, measurement and evaluation
- Board involvement and engagement on committees, special initiatives and continuous education and information
Progress

- Completed design of “Stone Soup Makers Initiative” (SSMI)--- strategy to build/strengthen collective impact ecosystem--- data, leadership, support and capacity (3 UW board members involved at various levels + the donor that made the pitch to the board)
- Synergistic relationships with partners and institutions with similar systems change goals (several board members engaged in other institutions, see UW creating win-win in community)
- Some resources into innovative strategies outside UW system to build capacity, move forward pieces of SSMI, seed change (social impact hub/asset mapping, higher education consortium/research) (1-2 UW board members involved)
- Convener and connector, collaborative friend and capacity builder on various social issues– seeking spots for leadership development and connection to new assets (several UW board members on boards of other organizations and want to see connections)
- Focus on equity and inclusion– our role, influence, and opportunities to ensure data is front and center, intentional efforts to build leadership in communities of color and to encourage and support person/role/organization/system change (UW board member champions + additional resources to support efforts)
Small Group and Large Group Discussion on Board Buy-in

• (45 min) **Discuss these questions in small groups:**
  
  - What is **working well** with engaging your Board in support of collective impact?
  - What are the **biggest challenges** with engaging your Board in support of collective impact?
  - What **tools/strategies have been helpful in breaking through obstacles** in fostering greater Board buy-in with collective impact?

• (20 min) **Debrief as a full group on your table discussions**
I. Brief Primer on Key Concepts of Collective Impact

II. Board Buy-in

III. Peer Assist: Organizational Implications of Investing in Collective Impact
Funders Will Need to Consider Several Organizational Implications When Investing in Collective Impact

- **Fostering system leadership skills for grantmaking staff** (i.e., adaptive, fostering shared aspirations, co-creation, listening, trust-building)

- **Engaging the community early and often** (and not just reviewing grant proposals from the office)

- **Listening proactively and closing feedback loops** with grantees and community partners

- **Making “rapid cycle” grants** for quick wins and prototyping

- **Agreeing to long-term commitments** that go beyond one-year cycles

- **Funding outside a core grantmaking focus area** if the community identifies that area of need in a common agenda development process

- **Working collaboratively with other funders** also investing in the same collective impact initiatives
COP Leadership Peer Assists: Purpose and Instructions

**Purpose**

- Structured process to help participants problem solve, and assist with, a particular challenge being faced by a colleague

**Instructions**

- Attendees will break into two rooms; each room will hear from two volunteers (*see next slide for discussion topics*)
- Peer assist volunteer #1 gives an overview of the problem and frames the discussion with a specific question (*5 min*)
- The group asks clarifying questions (*5 min*)
- The group talks to each other about the dilemma related to the questions framed by the presenter around the issue. During this time the presenter should listen to the discussion (*10 min*)
- The presenter responds to what s/he has heard; and the group discusses it as a whole (*10 min*)
- Repeat the process a second time, with peer assist volunteer #2 sharing their question and discussing with their breakout group using the same process (*30 min*)
## COP Leadership Peer Assists: Volunteers and Topics

<table>
<thead>
<tr>
<th>Room</th>
<th>Volunteer</th>
<th>Peer Assist Question / Topic</th>
<th>Timing</th>
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<tbody>
<tr>
<td><strong>Lakeview Room (current room)</strong></td>
<td>Kimberly Bash and Brian Treece, The Findlay-Hancock County Community Foundation</td>
<td><strong>Prioritizing Beneficiary Feedback:</strong> How have you engaged beneficiaries or other unheard voices in the collective impact process – as you strive to co-create solutions?</td>
<td>Round 1: 3:20-3:50pm</td>
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<tr>
<td></td>
<td>Kim Fortunato, Campbell Soup Foundation</td>
<td><strong>Helping Key Stakeholders Understand Complex Systems Change:</strong> How do you educate your key stakeholders to shift from traditional grantmaking to “change making”? This paradigm shift includes an understanding of systems change, capacity building, collective impact, shared value, long term investment philosophy, rapid cycle funding opportunities, etc.</td>
<td>Round 2: 3:50-4:20pm</td>
</tr>
<tr>
<td><strong>Clubhouse Room</strong></td>
<td>John Urbanski and Beverly Philipps, United Way of Hancock County</td>
<td><strong>Tracking and Reporting on Progress:</strong> How have you consistently reported back progress and small wins to different stakeholders?</td>
<td>Round 1: 3:20-3:50pm</td>
</tr>
<tr>
<td></td>
<td>Alicia Dicks, The Community Foundation of Herkimer and Oneida Counties</td>
<td><strong>Fostering a “Systems Thinking” Skillset:</strong> We need to transition from responsive to strategic skills. Systems thinking is critical to that work. We have successfully attracted talent. Now we need to work on retaining that talent. How can we best utilize these system thinking skills internally?</td>
<td>Round 2: 3:50-4:20pm</td>
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**Whichever room you choose is the room you stay in for both rounds of peer assists. We will return as a full group after round 2 of peer assists**
Report Out and Group Discussion

• For the peer assist volunteers, what was the experience like for you?
  – What were some of the most helpful insights from your funder peers? What are major tips that emerged from your peer assist discussions that you want to share with full group?
  – What are some unanswered questions that came up in your peer assist discussions that you want to “crowd-source” with the full group?

• For those providing feedback / advice, what are notable takeaways for you about the conversations?

• What are questions / topics that didn’t come up today that you’d like to see covered in future COP calls or meetings?