

Collective Impact Fellowship:

An innovative grant making and service delivery mechanism developed by The Rider-Pool Foundation

The unprecedented economic boom in center city Allentown, catalyzed by the creation of a Neighborhood Improvement Zone (NIZ), and solidified by the relocation of several leading Lehigh Valley companies, is positioning downtown as a major business and entertainment “hub” for the region.

Ensuring long-term success and community-wide benefits of this transformation will largely depend upon significant improvements to quality of life – including housing, health, education, public safety and jobs – in the neighborhoods surrounding the NIZ. Historically, the Lehigh Valley has taken an “isolated impact” approach (i.e. addressing education without including other influencing factors) to issues that are complex and inter-related.

Research and best practice tell us that addressing these complex challenges requires a new approach and style of leadership. Organizations need more exposure to strategies that create win-win solutions and collaboration across sectors and silos. One approach that is gaining increased attention in communities across the country is called “Collective Impact”. Collective Impact can be a helpful frame for structuring collaboration that increases efficiency of resources, amplifies impact and drives alignment across community systems. Collective Impact, as well as other forms of structured collaboration, requires a deeper understanding and application of systemic leadership.

Local funders have identified Collective Impact as a required approach to address deep-rooted challenges within downtown Allentown. Non-profit leaders have embraced this approach, but also have identified the need for training and leadership development to effectively apply this strategy.

The Rider-Pool Foundation has adopted a proactive approach in meeting these needs through the development of a Collective Impact Fellowship. Now in its third year, a group of not-for-profit leaders representing multiple community systems is selected annually to be trained by national experts in systemic leadership, Collective Impact strategies, community engagement and program design and evaluation. At the conclusion of this program, Fellows will be invited to work as a team to develop and implement strategies that directly apply this training to improving the quality of life in the neighborhoods surrounding downtown Allentown.

COLLECTIVE IMPACT FELLOWSHIP

SYLLABUS OVERVIEW

September- Orientation

Faculty- Christine Carpino, PhD, Fellowship Program Manager

Learning Objectives:

1. Fellows will have a thorough understanding of activities and expectations of the Collective Impact Fellowship
2. Fellows will learn how to access and use the Fellowship Wikispace

October- Principles and Application of Collective Impact/Systems Mapping

Faculty: Erin White, Senior Director, America's Promise Alliance

Overview:

Using the Collective Impact model and framework, Fellows will spend three days gathering a deeper understanding of the principles and application of strong cross-sector partnerships as a way to address complex social issues that impact multiple systems.

Learning Objectives:

At the end of the session, Fellows should understand:

1. The basics of complexity and how it relates to collective impact
2. The five key conditions of collective impact
3. The basics of how to structure a Common Agenda
4. Why structure and process are so important in collective impact
5. How systems strategies differ from program strategies
6. How to measure and communicate progress in collective impact

November- Foundations for Achievement

Faculty: Beth Schermer, Principal, Christofolo Schermer Consulting
Rosemarie Christofolo, Principal, Christofolo Schermer Consulting

Overview:

This three day work session starts with a simple definition of leadership as the skillful use of influence to create a climate in which people can do their best work towards the goals of the organization or collective. This session is based upon a deeply researched model called Foundation for Achievement that focuses on three key components of leadership—understanding the motives that drive behavior, strengthening organizational climate and imbedding a discipline of effective goal setting and achievement. The Fellows will explore each of these components in depth during this interactive work session and will identify specific ways to use these elements to advance both the work of the Fellowship as well as that of their own organizations.

In advance of the work session, Fellows will complete two individual assessments providing feedback on individual motives and leadership styles. The program includes individual coaching to allow the Fellows to apply the principles of leadership to specific initiatives.

Learning Objectives:

1. Understand individual motives, their impact leadership behaviors and organizational climate and performance, and how to align them with specific projects and goals to improve engagement and execution
2. Learn how to quickly impact work group effectiveness and develop a shared vocabulary to drive clarity, alignment and responsibility within the group
3. Adopt best practices on goal-setting, execution and integration of learning and experience to improve performance on an ongoing basis

December- Collective Impact Program Design and Evaluation

Faculty: Jared Raynor, Director of Evaluation, TCC Group

Overview:

In these sessions, we will focus on types of evaluation and begin to develop a logic model based on the individual Action Learning Project. Fellows will think through and develop the strategies, outputs, outcomes and impact for their individual ALP. Fellows will complete the logic model and discuss the indicators that will be used to identify success.

Learning Objectives:

1. Fellows will share and review the indicators and/or metrics used by each organization
2. Explore various methods and strategies to evaluate Collective Impact at each stage; emphasis will be placed on the early stages of Collective Impact that are more relevant to this group
3. Use draft project rubric to guide a discussion around the continuation of work post-fellowship using cross-sector partnerships to address complex social issues

January- Community Engagement: Community Based Participatory Approach (CBPA): Tools and Strategies for Community Leadership and Transformation

Faculty: Melvin Jackson, MSPH, Director of Operations, Strengthening the Black Family, Inc.
Alexandra Lightfoot, EdD, Director, Community Engagement, Partnership and Technical Assistance, University of North Carolina-Chapel Hill

Overview:

Community-Based Participatory Research (CBPR), as defined by the Kellogg Foundation's Community Health Scholars Program, is a "collaborative approach to research that equitably involves all partners in the research process and recognizes the unique strengths that each brings. CBPR begins with a research topic of importance to the community with the aim of combining knowledge and action for social change to improve community health and eliminate health

disparities.” National organizations, funding agencies, researchers and communities are increasingly calling for collaborative models that involve intended beneficiaries in planning, organizing, bringing about, and sustaining community transformation. CBPR is an approach to inquiry (CBPA) that centers on community strengths as well as issues and provides people in communities with the means to conduct systematic investigation for the purposes of building awareness and taking action to resolve specific problems. Collaborative approaches can be challenging, however, given the different cultures, structures, priorities, leadership, policies and practices of community and organizational stakeholders. What is distinctive about CBPA is a set of principles to help guide the openness, ensure the fluidity, and navigate the unpredictability of a collaborative approach to research, evaluation, program strengthening, and community transformation.

This module will introduce Collective Impact Fellows to CBPR principles and the approach as an effective tool for building stakeholder partnerships to engage and address complex, multi-layered community issues. We will use a blend of brief presentations, group discussions, and interactive exercises to stimulate the Collective Impact Fellows to think creatively about how to apply the approach, tools and strategies to their work in Allentown.

Learning Objectives:

1. Describe the community-based participatory research approach (CBPA)
2. Provide examples of ways in which communities have been engaged in CBPA
3. Engage Collective Impact Fellows in an interactive CBPA exercise
4. Discuss implications for Fellows’ work in Allentown

February- Effective Communication and Messaging

Faculty: Beth Schermer, Principal, Christofolo Schermer Consulting
Rosemarie Christofolo, Principal, Christofolo Schermer Consulting

Overview:

Communication is the leadership bridge between people, organizations and various interests. Leadership effectiveness is, in large part, impacted by the strength and breadth of a leader’s communication skills. In the press of day-to-day business, leaders often focus on information dissemination rather than communication. Effective leaders think beyond the specific information to be shared and focus broadly on communication as a vehicle for influence.

In this work session, we will focus on how to leverage communication as a means of influencing others. The Fellows will gain familiarity with tools that will help them to understand their audiences and the goals of different types of communication, assess delivery methods, and craft messages that resonate and move people to act.

The Fellows will complete a communications assessment in advance of the work session that identifies communication preferences and strengths. The program will include individual coaching to allow the Fellows to apply the communication tools to specific activities.

Learning Objectives:

1. Understand different communications preferences, perceptions and related personality types
2. Use practical tools to improve one-on-one and one-to-many communication through language preferences, channels and recognition
3. Learn to recognize miscommunication in real time, diagnose the cause and intervene to prevent the unproductive behaviors that often follow

March- Community Engagement: Digital Storytelling

Faculty: Lora Taub-Pervizpour, Ph.D. Associate Dean for Digital Learning and Professor, Media & Communication at Muhlenberg College

Overview:

This workshop is designed to introduce fellows to the principles and practices of digital storytelling—storytelling that leverages word, image, and sound to share powerful first-person narratives about individuals, organizations, and communities. Participation in this workshop will support the individual and collective goals of the fellows through: 1. Developing familiarity with the basic tenets, practices, and possibilities of digital storytelling in non-profit organizations 2. Establishing a shared understanding of the storytelling goals for this program and lay a foundation for your own personal narratives 3. Engaging in hands-on experience with digital storytelling tools 4. Receiving recommendations for next steps in developing a storytelling strategy for fellows, including tools, content, and further learning. In advance of the workshop, fellows will ideally prepare in the following ways:

Learning Objectives:

1. Develop familiarity with the basic tenets, practices, and possibilities of digital storytelling in non-profit organizations
2. Establish a shared understanding of the storytelling goals for this program and lay a foundation for your own personal narratives
3. Engage in hands-on experience with digital storytelling tools
4. Receive recommendations for next steps in developing a storytelling strategy for fellows, including tools, content, and further learning.

April- TBD

May- Community Engagement: Appreciative Inquiry

Faculty: Joshua Nespoli, Principal Consultant, Next Edge Consulting

Overview:

Appreciative inquiry is a search for knowledge built on theory that seeks intentional collective action from, in this case, society as a whole (Cooperrider and Srivastava, 1987). It is grounded in a series of core principles developed by David Cooperrider and his colleagues that make it ideal

for garnering data sets targeting a group of people's ideals. The first, that reality is built through conversations and social interactions, requires face-to-face communication and dialogue between members of a community. The second, that change comes from asking questions, implies that simply by asking questions we have already put the process of change in motion. The notion that we choose what we study and the lens through which we study it, which is the third principle, suggests that it is our choice in how we approach whatever lay before us. In Ai we choose to focus on positive possibilities (Whitney, Cooperrider, Trosten-Bloom, & Kaplin, 2002). This leads into the fourth principle. Our words matter, and focusing on strengths leads to positive, collective energy that promotes collaboration. In Ai this manifests through redefining problems as solutions. The fifth principle – envisioning the ideal future acts as a guide towards positive change – assumes that defining our dreams can help us identify the positive changes that are needed to get there (Cooperrider and Srivastava, 1987).

Session Goal: To provide a general understanding of the Ai model and how it can be a useful tool in community revitalization

Learning Objectives:

1. Understanding the 8 Principles of Ai theory
2. Identifying the 4 Ds of Ai Cycle
3. Simulating the Ai process

June-Collective Impact and Funder Partnerships

Faculty: Ron Dendas, MS, Program Officer at The Rider-Pool Foundation

Edward Meehan, MPH, Executive Director at The Rider-Pool Foundation

Christine Carpino, PhD, Fellowship Program Manager

Overview: As this nine-month journey draws to an end, the group will implement a plan to:

- Contribute to the capacity building for collective impact and other cross-sector partnerships
- Create the environment and culture to do this work in partnership with funders
- Continue to learn and hone their skills
- Connect with the Fellows from earlier classes

Learning Objectives

1. Fellows develop skills to engage funders in more meaningful partnerships by sharing and discussing post-fellowship plans with Rider-Pool Foundation staff
2. Fellows develop meaningful ongoing connections with other CI Fellows through Community of Practice

2017 COLLECTIVE IMPACT FELLOWSHIP FACULTY

Rosemarie Christofolo

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Rosemarie Christofolo brings over two decades of experience in advising and organizing businesses to her work. From 2002 to 2008, she was the executive vice president of Altour, a global travel management company based in New York, and other related companies in the Altour corporate family. During her tenure, the company tripled in size through multiple acquisitions, shared services ventures, strategic alliances and organic growth; her work focused on establishing shared goals and building consensus across teams and offices in the United States and abroad. Specifically, Rosemarie oversaw organizational development and design, strategic planning, human resources, legal, IT, marketing and public relations. She also served as President of Altour's technology subsidiary, which designed, developed and managed incentive and recognition programs for employees, sales channels and consumers.

Before her work at Altour, Rosemarie was a partner at the law firm of Lewis and Roca where she grew the firm's Intellectual Property and Technology Section into a national practice representing clients ranging from the United States Postal Service to technology start ups. She also served in many leadership roles including heading the firm's Business Section, and serving on the Management Committee.

Rosemarie is trained in and certified to teach the following leadership, communications, change and organizational development models:

- Leadership Process Motivating Achievement
- Process Communication Model
- The Change Cycle
- The Birkman Method

Rosemarie received her B.A and her J.D. from Arizona State University.

Melvin Jackson, MSPH
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Melvin Jackson, MSPH, Community Expert, is Director of Operations for Strengthening The Black Family, Inc., a community-based non-profit organization in Raleigh, NC. He has extensive experience training community and academic partners in CBPR and building the capacity of community-based organizations. For the University of North Carolina, he serves as Community Course Director for the UNC Faculty Engaged Scholars Program and Community Expert Consultant for the NC Translational Research and Clinical Sciences Institute's Charrette Community Engagement Consulting Model. He is Co-PI for the NIMHD-funded Focus on Youth + ImPACT: A Pilot Project to Test an HIV/AIDS Curriculum in Faith-Based Settings, recently expanded to public housing communities, and Program Director for the CDC-funded Project DIRECT, the largest community-based demonstration project in the nation addressing the health disparity of diabetes. Mr. Jackson has recently launched the North Carolina Community Health Leadership Roundtable and the NC Community Partners Forum with Al Richmond, Executive Director of Community Campus Partnerships for Health. The goal of this effort is to help Community Based Organizations and Community Leaders gain skills, knowledge and a network of peers to better position them to engage in community-academic research partnerships focused on addressing health disparities.

Alexandra Lightfoot, EdD
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Alexandra Lightfoot, EdD, directs the CBPR Core at the Center for Health Promotion and Disease Prevention, a CDC-funded Prevention Research Center at the University of North Carolina at Chapel Hill. In this capacity, she promotes the use of CBPR and provides trainings, workshops and technical assistance to diverse stakeholders. She directs a community engagement initiative (the Charrette model) designed to strengthen community-academic research partnerships in affiliation with the North Carolina Translational Research and Clinical Sciences Institute. In partnership with Melvin Jackson, she leads a CBPR study, Focus on Youth + ImPACT, which focuses on HIV prevention with African American youth in African American churches and public housing communities. As Adjunct Assistant Professor of Health Behavior in the UNC Gillings School of Global Public Health, she co-teaches a graduate course on CBPR and Photovoice and is currently conducting a Photovoice project with Latino/Latina adolescents. With a background in educational research, Alex is particularly interested in the intersection of educational inequities and health disparities.

Joshua Nespoli
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Josh is Principal Consultant at Next Edge Strategies, where he utilizes appreciative inquiry, collective impact, and generational studies to guide non-profits and small businesses through capacity building and strategic design. Josh also serves as Co-Founder and Chairman of the Board at For The Cause, whose community programming supports local health initiatives and revitalization efforts, in addition to delivering 25,000 supplemental meals to children and families annually.

Josh received his B.S. in Business Administration from Babson College, his M.S. in Organization Development and Leadership from St. Joseph's University, and studied Appreciative Inquiry with the Corporation for Positive Change. He is passionate about the revitalization of his hometown, and spent the last year using appreciative principles to organize the grassroots initiative DreamBerwick.Org.

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Jared Raynor is the Director of Evaluation at TCC Group, a management consulting firm with over 30 years of serving nonprofit organizations, private foundations, a corporate social responsibility programs. His work at TCC has included evaluations of capacity building initiatives, evaluation system design, strategic planning, and strategic organizational assessment. He has worked extensively on evaluating policy and advocacy work, including working with The California Endowment to evaluate their general operating support grants to advocacy organizations and evaluating The Atlantic Philanthropies' post-9-11 funding to civil liberties organizations. Recently, he conducted a comprehensive national field study of grantmaker practices for Grantmakers for Effective Organizations. Raynor is the author of “What Makes an Effective Coalition: Evidence Based Indicators of Success” and “Building an Effective Advocacy Organization: A Framework for Examining Advocacy Organizational Capacity.”

Prior to joining TCC, Raynor worked in a number of international organizations and U.S.-based development organizations. He is a graduate of the Milano Graduate School at New School University where he received an MS in Organizational Change Management, focusing on community development and the organizational structure of development organizations in humanitarian emergencies. Raynor also holds bachelor's degrees in Finance and Spanish from the University of Utah.

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Beth Schermer had a national health law practice focused on health care providers and related business initiatives, accreditation and licensure matters, quality review, governance and regulatory issues. As outside general counsel to the Arizona Hospital and Healthcare Association for 25 years, she had extensive engagement in Arizona policy and advocacy matters. Her work often involved the formation of coalitions to reach state-wide goals, including tobacco tax initiatives to increase access to Arizona’s Medicaid program, alliances to expand graduate medical education and efforts to address health workforce shortages. In 2005-2006, she served as Vice Dean, University of Arizona College of Medicine—Phoenix. In that role

she was responsible for organizing and leading the senior team for the new four-year program, recruiting the founding faculty, securing accreditation, and identifying potential educational, research and clinical partnerships.

Beth serves on the board of directors of St. Luke's Health Initiative and is its immediate past chair of the board. In this capacity, she has provided oversight and support to the organization's community development, educational and public policy work and the examination of opportunities for collective impact initiatives in Arizona.

Beth is trained in and certified to teach the following leadership, communications, change and organizational development models:

- Leadership Process Motivating Achievement
- Process Communication Model
- The Change Cycle
- The Birkman Method

Beth received her B.A. from Yale University and her J.D. from Harvard Law School.

Lora Taub-Pervizpour

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Lora Taub-Pervizpour is Associate Dean for Digital Learning at Muhlenberg College, where she also teaches courses in Media and Communication and co-directs the HYPE youth media / youth leadership program. For more than two decades, her research and teaching have explored the opportunities that new digital tools present for young people to contribute their voices to public dialogues. This work has been rooted in diverse communities, from Berkeley, California, to Sao Paulo, Brazil, and now in Allentown. Her work on digital storytelling appears in *Storycircle: Digital Storytelling Around the World* and *Media and Social Justice*, two chapters that look closely at digital storytelling collaborations with Allentown youth.

Erin White

Senior Director to the Office of the President at America's Promise Alliance

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Erin has worked with nonprofit and government entities across a range of social issues, with a particular emphasis on collective impact and other non-traditional public sector partnerships.

She has led several projects in Dallas focused on improving child health outcomes through a collective impact approach. Erin's client, Children's Medical Center Dallas, is a 100 year old nonprofit hospital serving north Texas that recognized the need to move outside the walls of the hospital to deliver care to the community. They brought together leaders from education, clinical care, faith community, social service agencies, government, payers to discuss a holistic approach to child health outcomes, with a focus on asthma and obesity. Erin also led a project to develop a collective impact approach to fight youth substance abuse in Staten Island, New York including developing the coalition, backbone, strategic and implementation plans, and fundraising support.

Erin recently co-authored an article in Fall 2014 edition of the Stanford Social Innovation Review entitled "Making Public Policy Collective Impact Friendly", and has spoken to a wide variety of funders, nonprofits, and government entities on various topics in collective impact.

Prior to joining America's Promise Alliance, Erin worked as an associate director at FSG, heading up several collective impact initiatives, strategy consultant at Booz Allen Hamilton to address organizational and core mission challenges in public sector clients through strategic planning, program evaluation, and process improvement. Erin also previously served as Senior Advisor to the Secretary at U.S. Department of Agriculture, where she developed policy to expand and enhance partnerships with nonprofit organizations in federal programs in order to more effectively deliver services to those in need. Erin holds a B.A. in Government from Harvard and a MSc. Public Policy and Administration, with honors, from the London School of Economics.