



*Handout Materials*

Getting Started with Collective Impact

# **Setting the Scene for Collective Impact**

*Webinar 2 of 3*



**COLLECTIVE  
IMPACT FORUM**



REIMAGINING SOCIAL CHANGE

# 1. Welcome



Welcome to “**Setting the Scene for Collective Impact**” the second webinar in a three-part series on “Getting Started with Collective Impact.”

This series is designed to help you learn more about starting a collective impact initiative and how to get your initiative off on the right foot. You’ll hear from consultants from FSG who have helped implement dozens of initiatives as well as partner practitioners who are working “on the ground” in these initiatives.

## **In this webinar, we’ll focus on:**

1. How to identify champions and form a cross-sector group
2. How to map the landscape and use data to define the problem and make the case for change
3. How to include the voices of community members

In the following pages, you’ll find tools and worksheets to help you through this part of the journey.

For additional resources, please visit the Collective Impact Forum at <http://www.collectiveimpactforum.org>.

## 2. Glossary of Terms



**Community Engagement** – Working with citizens by educating, informing, collaborating, empowering, and listening to them as partners in achieving the goals of the collective impact initiative.

*Types of engagement:*

**Broad-based Community Engagement** – Efforts to reach a large and varied set of stakeholders within a community, including the general public rather than a targeted group of experts, leaders, or special interest groups

**Targeted Engagement** – Effort to engage a particular group, often one that is under-represented or otherwise not engaging in an initiative without such a specialized effort.

**Stakeholder** – An individual with influence over or interest in a social issue or event. This interest is often due to a perceived potential impact of the issue on something that the individual values.

**Steering Committee** – A group comprised of cross-sector community partners representative of the relevant ecosystem that provides strategic direction for the Collective Impact initiative and champions its work. Alternative terms for this group include Advisory Group, Advisory Council, and Leadership Table.

# 3. Steering Committees



## Responsibilities

Steering committees have several responsibilities, including:

- **Providing strategic guidance, vision, and oversight**
  - Refine common agenda as needed, including problem definition, goals, and indicators.
  - Use data to inform strategy development and learning.
  - Track progress of work using agreed-upon indicators.
  - Foster connections within (e.g., among working groups) and outside the coalition (e.g., with other community initiatives) to ensure coordination and efficiency.
- **Providing leadership**
  - Champion the effort broadly in the community.
  - Where relevant, align the work / interventions of my organization to the goals, indicators, and strategies.
  - Share own organization's data coalition.
  - Participate in sustaining the coalition's capacity and energy.
  - Commit to providing ongoing guidance to backbone as they work with all partners to implement the common agenda.

# Best Practices

The following best practices will keep your initiative on the right track:

<input type="checkbox"/> Two co-chairs	<input type="checkbox"/> Diverse, cross-sectoral membership	<input type="checkbox"/> Regular communication
<input type="checkbox"/> Meetings at least quarterly	<input type="checkbox"/> Coordinated activities	<input type="checkbox"/> Report-outs to the community

## Who to Invite

Starting with good data will help you determine who to invite:

### 1. Demographics

- What does your community look like?
- Who does the problem impact?



### 2. Important Stakeholders

- Which organizations participate in the systems you are targeting?
- Who can bring others along?



### 3. Information About the Problem

- What is the geographic extent of the problem?
- What are the major drivers of the problem?



Ideal characteristics of those in the steering committee are:

<input type="checkbox"/> Decision makers	<input type="checkbox"/> Influential champions	<input type="checkbox"/> Passionate with a sense of urgency
<input type="checkbox"/> Representative	<input type="checkbox"/> Committed	<input type="checkbox"/> Focused on the greater interest
<input type="checkbox"/> Content expertise/practitioners		

## Get Them to Come

Come prepared to your conversation with:

1. **Data on the Problem:** Compelling quantitative data that describes scope of the problem, and qualitative data that puts a face on the impact in the community



2. **The Unique Role Their Organization Plays:** What perspective will this organization/individual bring, that no other can?



3. **Information about Collective Impact:** How is this approach different from prior attempts at collaboration?



4. **Who else is at the Table:** What individuals/organizations are there? What made them decide to come?



Best practices for your in-person invitation include:

Describe the purpose for having a CI effort on this issue

Identify the unique perspective and/or expertise that the invitee will bring

Describe the role and responsibility of a steering committee member

Share the commitment expected in terms of time and leadership

Steering committee lessons learned:



Relationships > Output



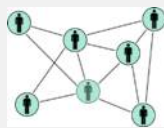
Speed vs. Inclusion



This Takes Time



Facilitation Matters



Groups are Fluid

# 4. Community Engagement

Community engagement happens along a spectrum:



	<b>Inform</b>	<b>Consult</b>	<b>Involve</b>	<b>Collaborate</b>	<b>Co-Lead</b>
<b>Objective of the Approach</b>	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, or solutions	To gather feedback from targeted stakeholders on the project's goals, processes, shared metrics, or strategies for change	To work directly with stakeholders continuously to ensure that concerns are consistently understood and considered	To partner with stakeholders in each aspect of the decision including the development of alternatives and priorities	To place final decision making in the hands of stakeholders so that they drive decisions and implementation of the work
<b>Examples</b>	Email newsletters  Send press releases announcing progress milestones	Ask for input on initiative strategies  Invite to small group or individual presentations about initiative	Invite to join Working Groups or an advisory body for the initiative  Partner in policy advocacy	Appoint to a leadership role on a Working Group to help shape strategies	Invite to join the Steering Committee and/or similar body with decision making power in the initiative

Source: Adapted from Tamarack Institute Community Engagement Continuum



The below table illustrates examples of each approach:

	<b>Inform</b>	<b>Consult</b>	<b>Involve</b>	<b>Collaborate</b>	<b>Co-Lead</b>
<b>Engagement Goals</b>					
<b>Understand system challenges</b>		Surveys or interviews about lived experience	Engage new voices in working groups		Invite to join steering committee
<b>Co-create solutions</b>		Interviews about strategies for change		Recruit community members to lead working groups	Enlist to co-direct strategies as WG co-chairs
<b>Verify the direction</b>		Public meeting to solicit reactions to draft common agenda			
<b>Expand reach</b>	Press / ad campaign			Make grants to develop and implement change strategies	Add SC members to represent missing perspectives
<b>Build community capacity to lead change</b>	Provocative media campaign; Community training		Enlist as spokespersons; enlist as trainers (train the trainer)		

There are three key challenges to effective engagement:



1. Understanding who to engage and how
2. Balancing efficiency and effectiveness
3. Overcoming obstructive norms

Essential engagement steps include:

**1. Defining Your Community:** Who is living with the impact of the problem each day? What demographic and geography is impacted?



**2. Addressing Tension:** Are there groups that have traditionally not been engaged? Create a safe place for honest discussion between and among groups.



**3. Getting Feedback:** Ask your community to hold you to account for the work. Have they felt heard? If not, why not? There is always time to learn together and adjust.



**4. Choosing the Right Methods:** First, determine your *intent or goal* in engaging community. The method should follow from your intended outcome.



# 5. Notes



A series of 18 horizontal lines for writing notes, spaced evenly down the page.

## 6. Upcoming Trainings



Once you have your steering committee positioned, how do you bring together everyone's viewpoints and passions toward solving one problem? Join us for our upcoming webinar to learn more about next steps for your initiative.

### [November 3, 2015 – Collaborating to Create a Common Agenda](#)

In this webinar, you'll learn:

- How to get to a common understanding of the problem being addressed
- How to conduct research and identify potential indicators for progress
- How to establish ownership and buy-in from key stakeholders and implementers

# 7. Resources



## [Steering Committee Toolkit](#)

### ***Tool***

This toolkit includes a number of tools for the formation of a Steering Committee:

- A guide for identifying steering committee members
- Descriptions of steering committee member responsibilities
- A steering committee governance agreement
- Sample steering committee meeting agendas
- Discussion guides

## [What Keeps Steering Committee Members Coming to Meetings?](#)

### ***Blog***

In this blog, FSG's Abi Ridgway explores five factors she has seen that made meetings valuable to steering committee members.

## [It's About the Community: Why Community Engagement and Process Matter in Collective Impact](#)

### ***Webinar***

This webinar explores why it is important to involve the community actively, how it can be done within a collective impact initiative, and the challenges and pitfalls of engaging the community.

## [Roundtable on Community Engagement and Collective Impact](#)

### ***Article***

From *Collective Insights on Collective Impact*, this article documents a roundtable discussion between scholars and practitioners as they explore why it is important to involve the community actively, how it can be done within a collective impact initiative, and the challenges and pitfalls of engaging the community.

## [At the Speed of Trust – Part 2](#)

### ***Blog***

FSG's Cara Priestly describes the approaches the initiative she was working with committed to in order to build trust with community stakeholders.

## [Advancing Racial Equity through Community Engagement in Collective Impact](#)

### ***Webinar***

Living Cities hosts this webinar on racial equity. Tackling racial inequalities head on is critical to dramatically improving results for low-income people. This webinar explores applying a racial equity lens to community engagement and collective impact work.



### **About the Collective Impact Forum**

The Collective Impact Forum, an initiative of FSG and the Aspen Institute Forum for Community Solutions, is a resource for people and organizations using the collective impact approach to address large-scale social and environmental problems. We aim to increase the effectiveness and adoption of collective impact by providing practitioners with access to the tools, training opportunities, and peer networks they need to be successful in their work. The Collective Impact Forum includes communities of practice, in-person convenings, and an online community and resource center. Learn more and join the community at [collectiveimpactforum.org](https://collectiveimpactforum.org).



### **About FSG**

FSG is a mission-driven consulting firm supporting leaders in creating large-scale, lasting social change. Through customized consulting services, innovative thought leadership, and support for learning communities, we help foundations, businesses, nonprofits, and governments around the world accelerate progress by reimagining social change. Our website is designed to provide you with the tools and resources you need to put ideas into practice. Learn more and visit the new [FSG.org](https://FSG.org).