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

October 26, 2017

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- We want to hear from you! Keep close to your computer to answer polls and ask questions

Robert Albright,
Director,
Collective Impact Forum

Poll:

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Today's Presenters

Melissa Oomer
FSG

Amber Parker
Operation Youth Success

Lauren Smith
FSG

Agenda

Components of the Common Agenda

Collective Impact Structures, Focusing on Work Groups

Work Group Selection

A Story from Omaha, Nebraska

Final Q&A and Discussion

Components of the Common Agenda

Lauren Smith
FSG

You are four months into a collaborative planning process and imagine that your initiative's …

✓ **Steering committee has formed, and is building great relationships**

✓ **Steering committee has a shared understanding of the problem**

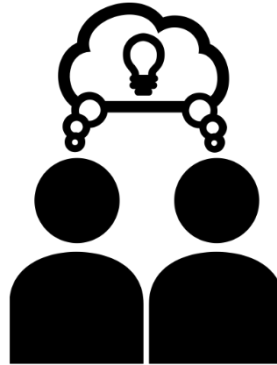✓ **Steering committee has a agreed to it's specific big hairy audacious goal**

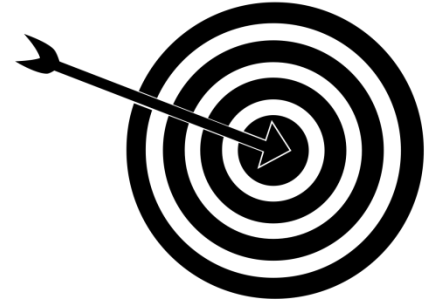# Now What?!?!

Several elements make up a common agenda

PRINCIPLES

How are you going to work together?

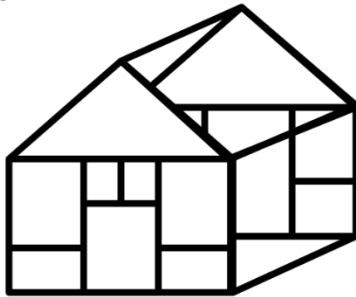**PROBLEM DEFINTION**

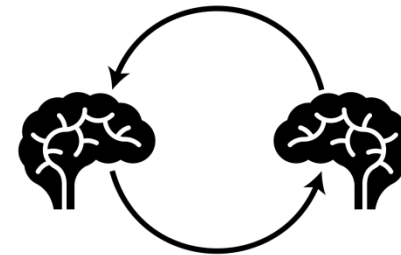*What is in and what is out?*

GOAL

How will you define success?

FRAMEWORK FOR CHANGE

How are you going to split up the work and prioritize?

PLAN FOR LEARNING

How will you track progress and learn?

How to set guiding principles

Key Considerations

- Promote your shared values

- Set the "rules of engagement"

- Draw on best practices for collaboration in your community

Illustrative Example

Serve the whole community through a systems oriented approach

Take an asset-based approach

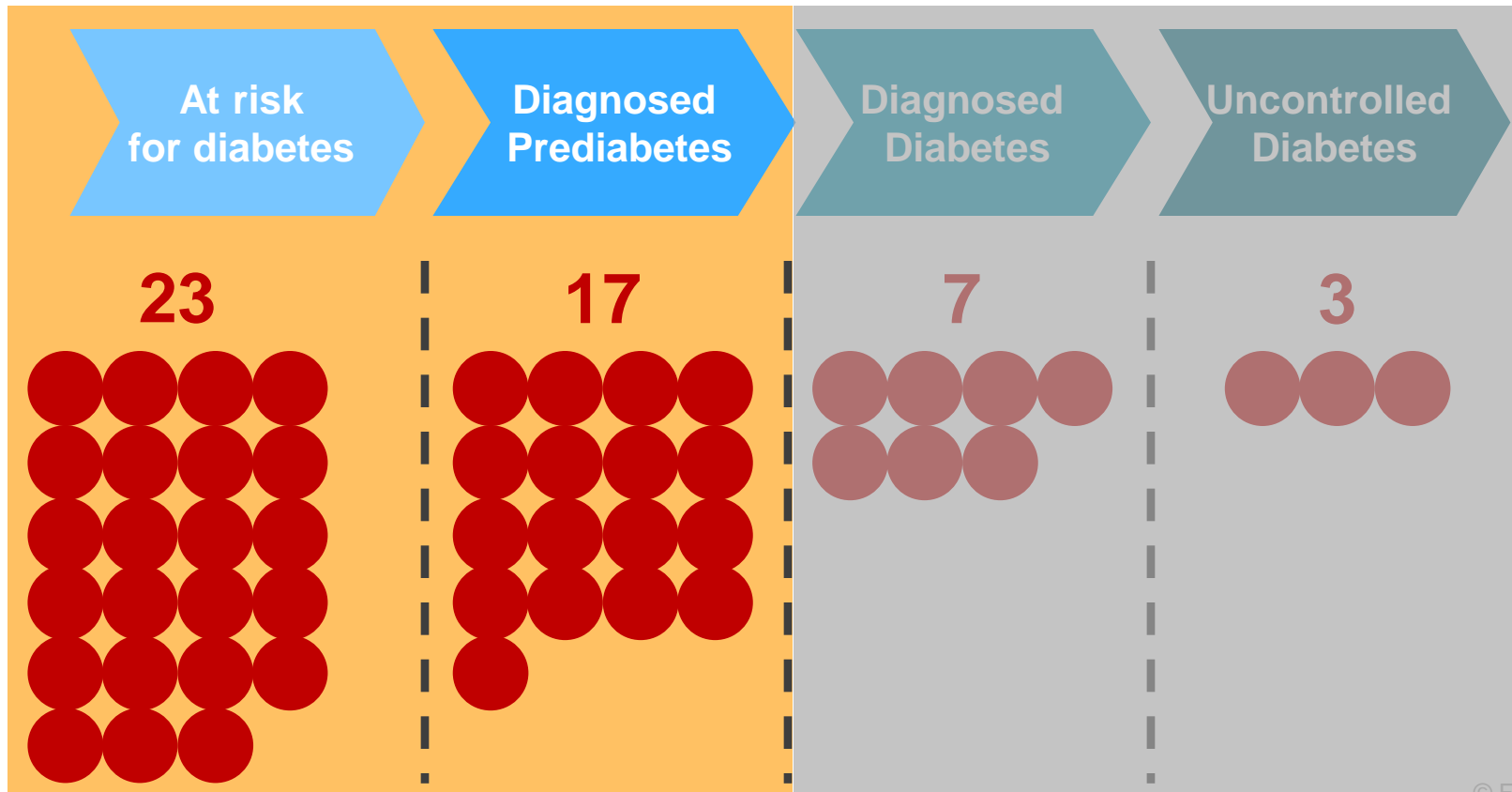This is everyone's responsibility

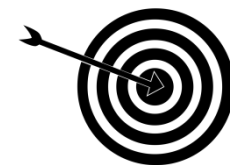Empower people and families

How to define the problem

Key Considerations

- Set boundaries
- Use quality data to inform thinking
- Allow to change over time
- Include community input on dimensions of the problem

At risk for diabetes	Diagnosed Prediabetes	Diagnosed Diabetes	Uncontrolled Diabetes
23	**17**	**7**	**3**

How to set your goal

Key Considerations

- Choose a population goal that can be measured

- Make it audacious and inspiring

- Add considerations for issues of equity

Illustrative Example

The goal of Unidos Contra Diabetes is…

to reduce the number of new cases of type II diabetes…

… in 5 years

…such that we cause a 10% reduction in the prevalence of diabetes by 2030.

We are committed to doing this by integrating primary and behavioral health for people at risk for diabetes in our community, with a particular emphasis of meeting the needs of low-income and underserved populations.

How to build your framework for change

Key Considerations

- Prioritize the strategies you want to work on first

- Build your groups for action

- Respect that this is an art and a science

- Include community voice at all levels

Illustrative Example
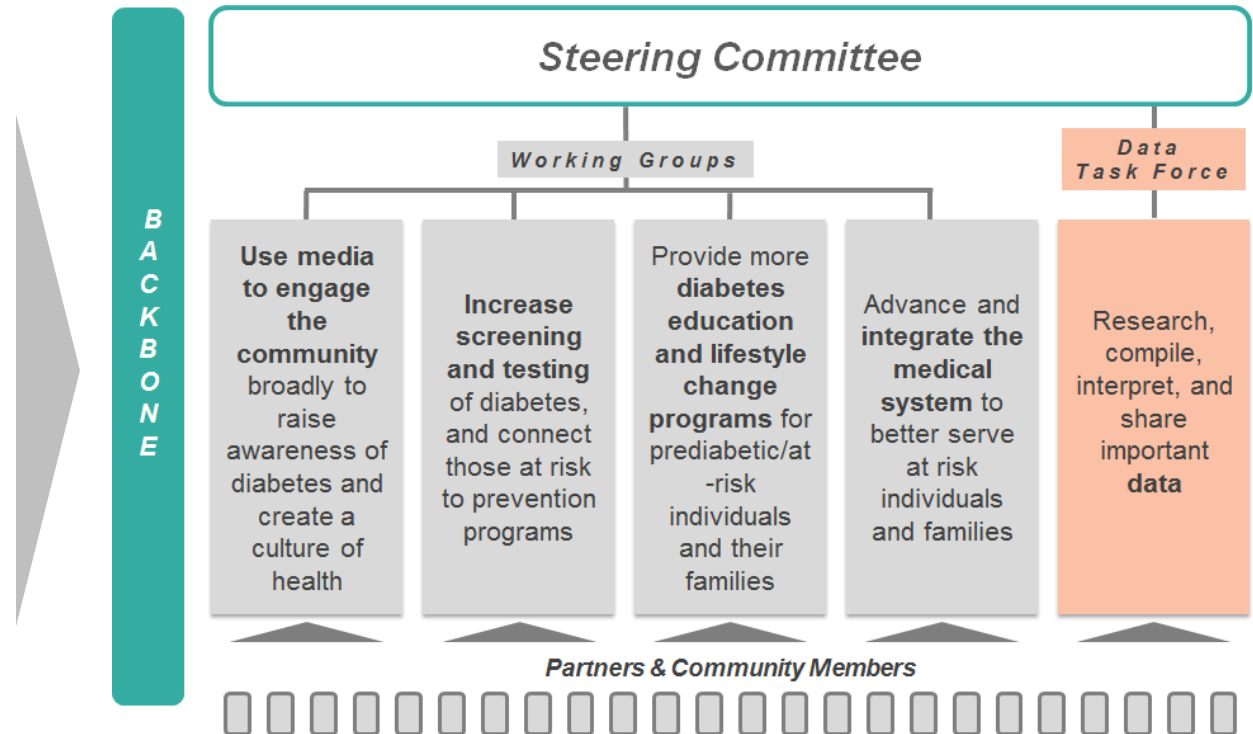
How to plan for learning
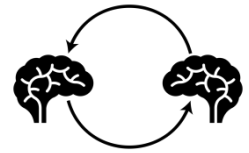
Key Considerations

- Incorporate early thoughts on shared measures

- Note change on different scales

- Strongly emphasize learning

Illustrative Example

Working Groups

1. Awareness
2. Screening
3. Programs
4. Integration

Policy

Healthy Community

Health Behaviors

Risk Factors

Diabetes

Working groups should engage the community in their effort for five reasons

1   **Understand pressing systemic community challenges**
- Understanding the issues
- Clarify questions that arise about the challenge
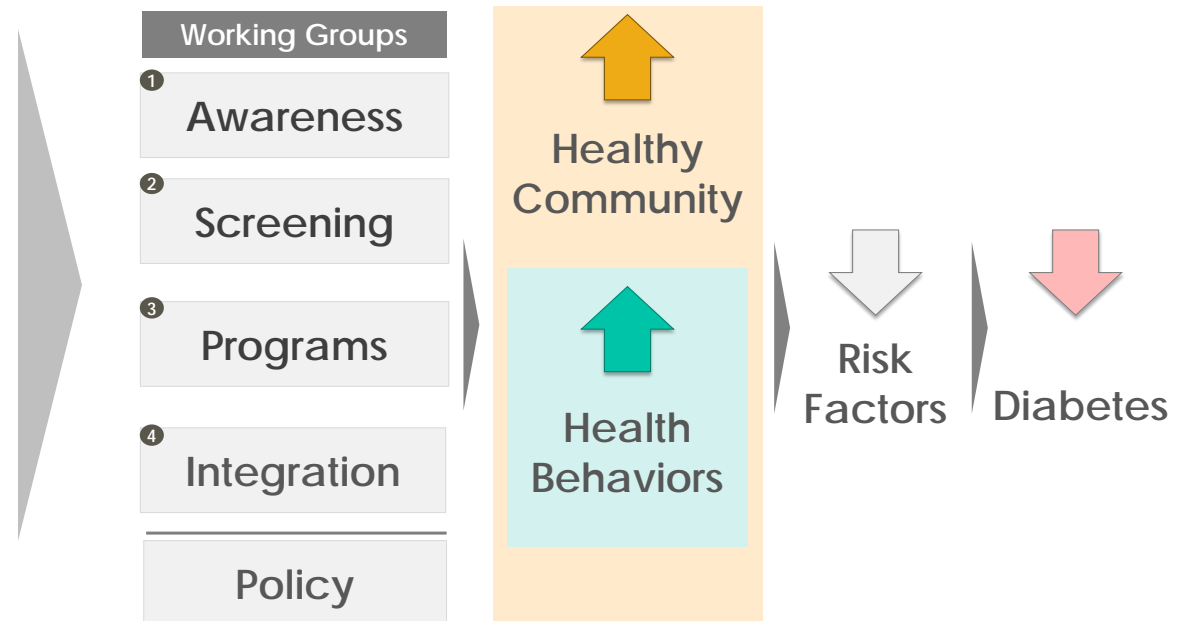
2   **Co-create solutions**
- Spark innovative problem-solving rooted in "lived experience" of the community
- Identify and spread unique solutions that exist within the community

3   **Verify the direction and prioritization**
- Get feedback on specific strategies and indicators from selected communities, particularly those who will be the end users of new programs or activities

4   **Expand the reach of strategies**
- Expand the reach of adoption of initiative strategies
- Evoke and sustain the will to take aligned action

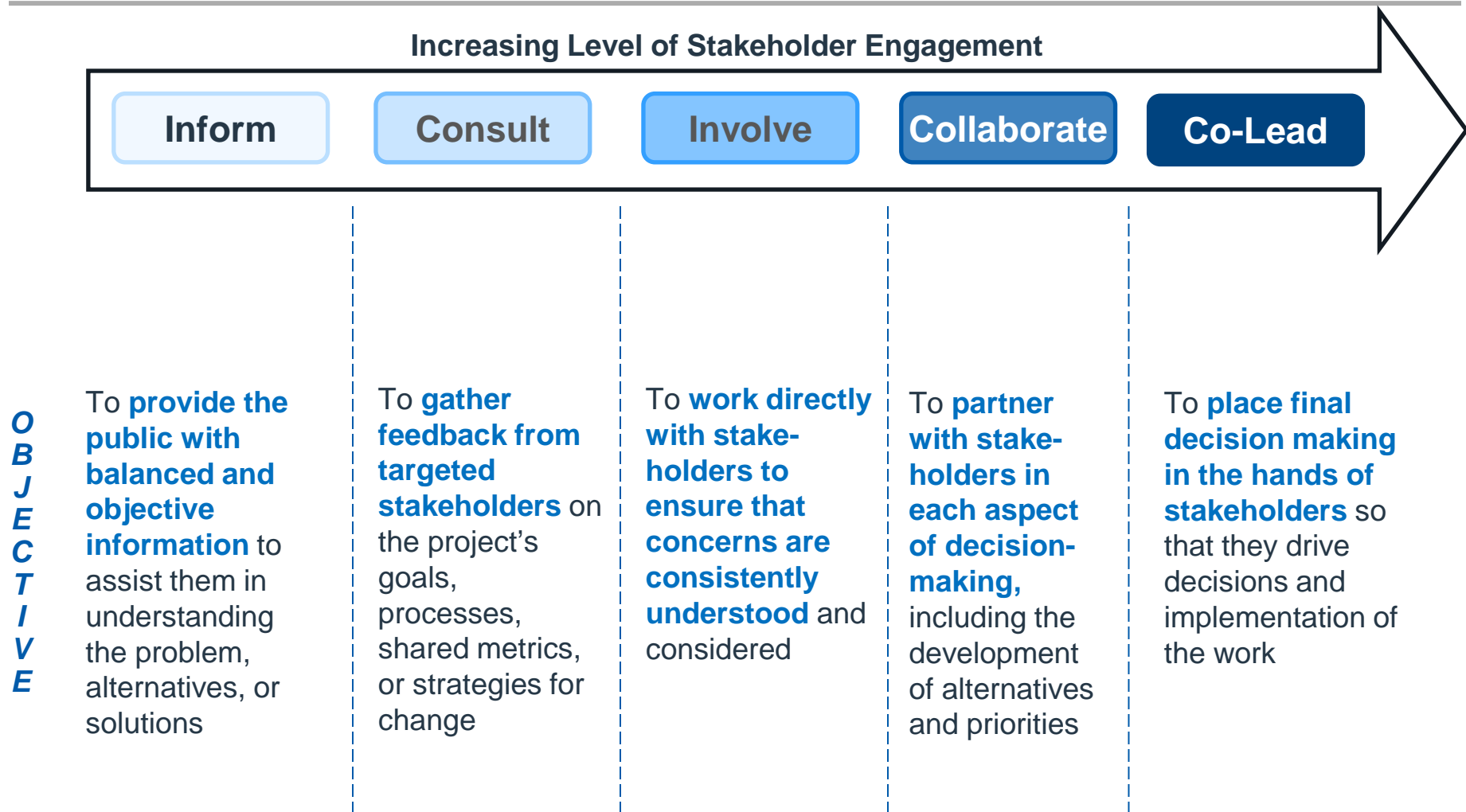**5**   **Build community capacity to lead and sustain change**
- Train stakeholders in skills of effective collaboration and strategy execution
- Share resources and learning across the community to help scale best practices

The common agenda process should engage community members in various ways

Increasing Level of Stakeholder Engagement

Inform	Consult	Involve	Collaborate	Co-Lead

O B J E C T I V E

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 stake-holders to ensure that concerns are consistently understood** and considered	To **partner with stake-holders in each aspect of decision-making,** 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

Worksheet #1: Creating a common agenda

Fill out three columns of the worksheet (page 1) relating to the five parts of a common agenda

- What is the status of each element (not yet started, in progress, completed)?
  - **Principles**
  - **Problem Definition**
  - **Goals**
  - **Framework for Change**
  - **Plan for Learning**
- What were success factors in getting agreement?
- What next steps will you take to move forward?

We will poll the group and discuss successes and challenges to move from vision to implementation as a group

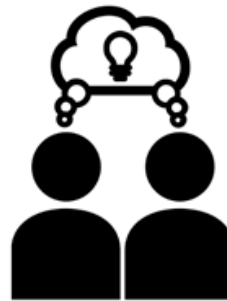# Poll: Which component of the common agenda is the most challenging for you?

Select the **one component of the common agenda that is most challenging** for your collective impact work:

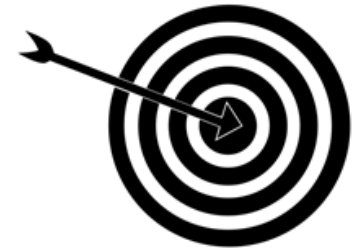**PRINCIPLES**
How are you going to work together?
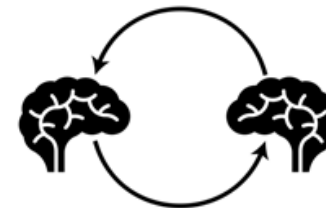
PROBLEM DEFINTION
What is in and what is out?

GOAL
How will you define success?

FRAMEWORK FOR CHANGE
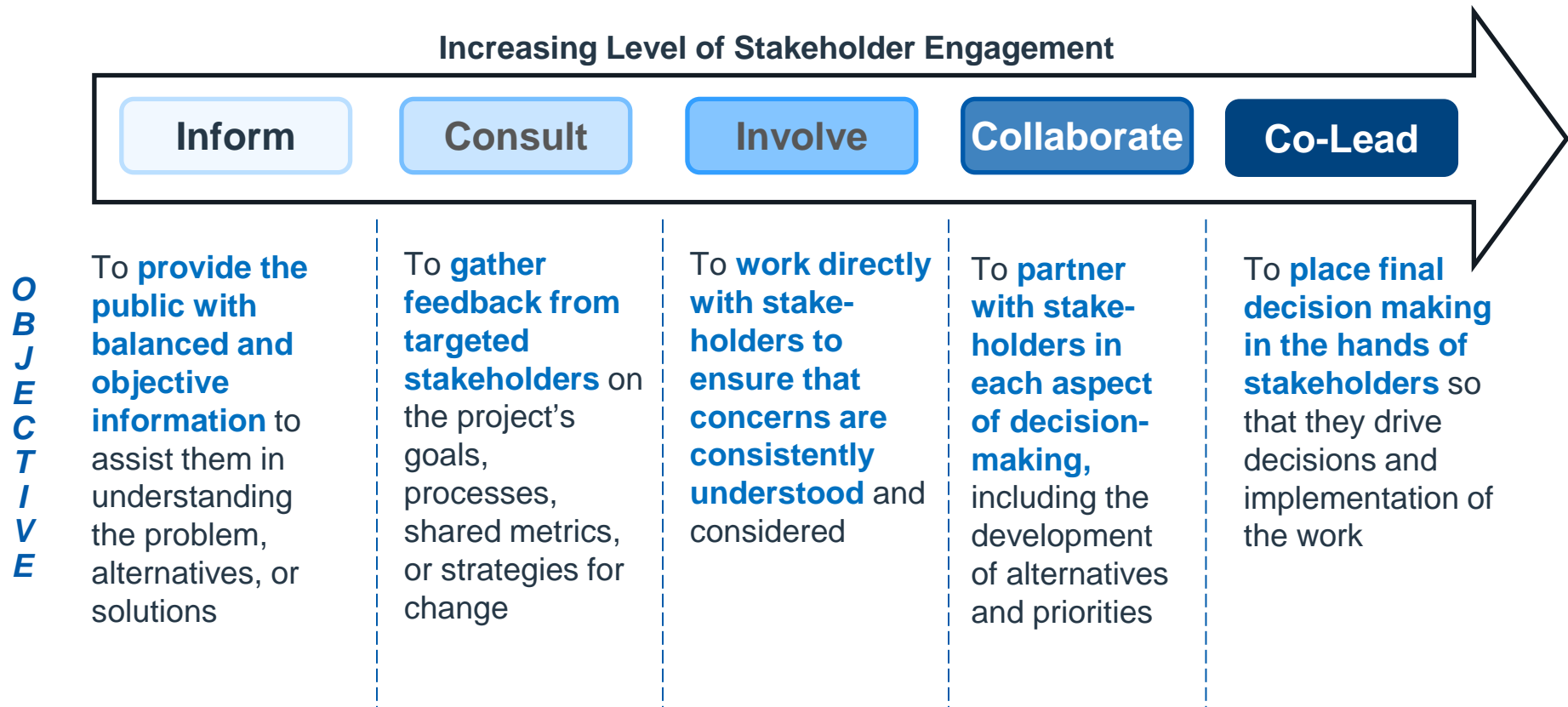How are you going to split up the work and prioritize?

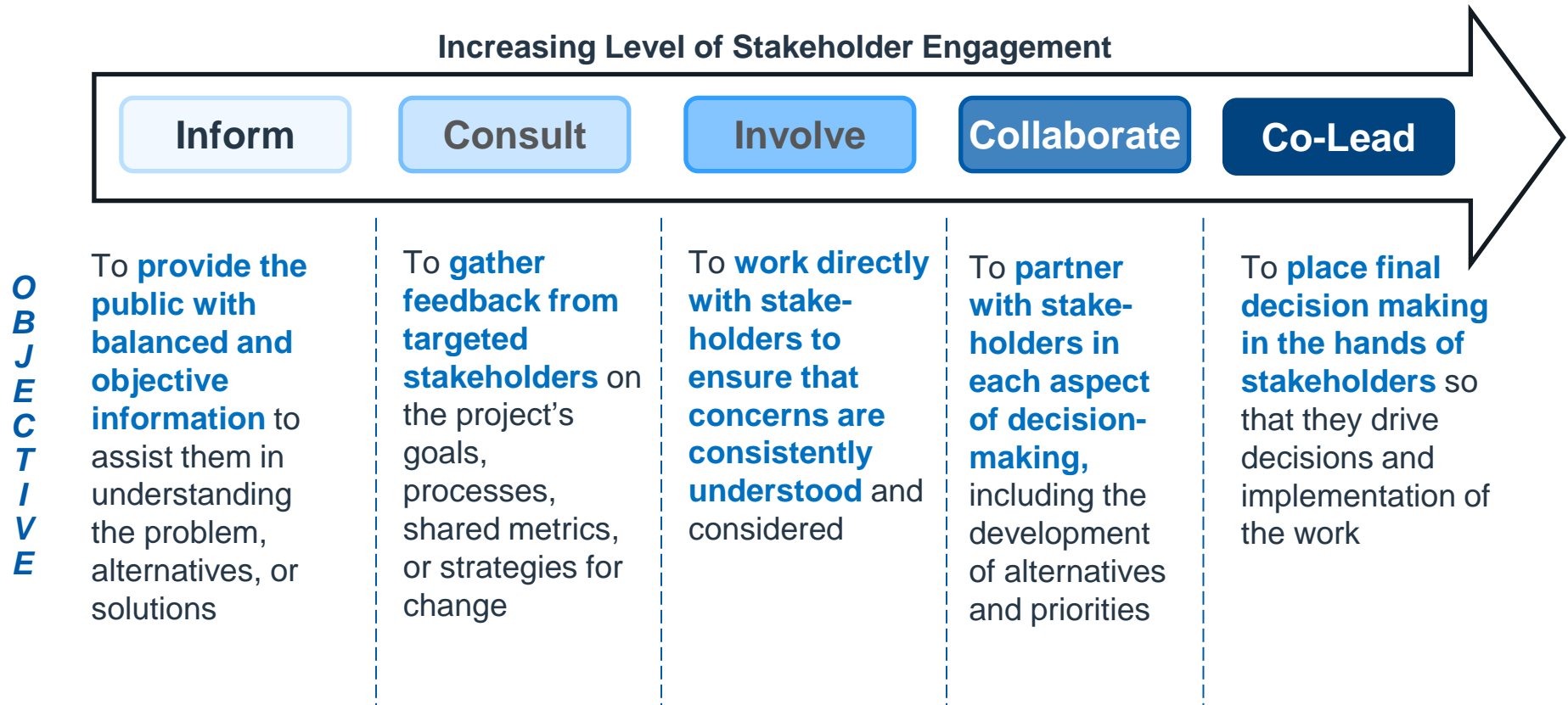**PLAN FOR LEARNING**
How will you track progress and learn?

Poll: Current community engagement

Select the one type of community engagement you have used **most frequently**

Increasing Level of Stakeholder Engagement

Inform	Consult	Involve	Collaborate	Co-Lead

O B J E C T I V E

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 stake-holders to ensure that concerns are consistently understood** and considered	To **partner with stake-holders in each aspect of decision-making,** 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

Poll: Future community engagement

Select the one type of community engagement you **hope to move to in the future**

Increasing Level of Stakeholder Engagement

Inform	Consult	Involve	Collaborate	Co-Lead

O B J E C T I V E

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 stake-holders to ensure that concerns are consistently understood** and considered	To **partner with stake-holders in each aspect of decision-making,** 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

Discussion / Q&A

What **outstanding questions** do you have about the **common agenda** and **community engagement?**

**Collective Impact Structures,
Focusing on Work Groups**

Melissa Oomer
FSG

Specific strategies will be identified and carried out by work groups

Common Agenda and Shared Metrics

strategic guidance and support | partner-driven action

Steering Committee

Backbone Support

Ecosystem of Community Partners

Work Group (Chair, Chair)

Work Group (Chair, Chair)

Work Group (Chair, Chair)

Work Group (Chair, Chair)

* Adapted from Listening to the Stars: The Constellation Model of Collaborative Social Change, by Tonya Surman and Mark Surman, 2008.

Work groups have the following responsibilities

Strategy and indicator development

- Review research on effective strategies within local context (if applicable) and external best practices
- Use data to inform identification of strategies and ongoing refinement
- Develop and refine indicators

Implementation

- Coordinate activities among work group member organizations and other relevant partners
- Identify resources to support and / or execute strategies
- Provide progress updates to and learn from the steering committee, backbone, and other work groups

Leadership

- Champion the effort with relevant stakeholders
- Align member organizations' work to the goals, indicators, and strategies of the work group where possible

Responsibilities of leadership and members

Leadership

- **Two co-chairs**
- Can **commit the time** (~3-4 hours / month plus meetings, but will vary)
- **Collaborative leaders** and facilitators, conveners, who "get stuff done"

Members

- **Issue-aligned, collaborative, action-oriented**
- **Balances the collaborative's goals** over their individual organization's in decision-making
- **Can commit** to attending meetings and reviewing pre-read materials
- Are **knowledgeable** about the problem to be addressed
- Usually **one level down** from the steering committee members, but have **authority** to represent organizations and make decisions
- **Cross-sector** representation
- **~10 members initially** (will vary by initiative, but should include both practitioners and lived experience / community voice)

Selecting Work Groups

Melissa Oomer
FSG

Work group formation is both art and science; here are some guiding considerations to help

The Science

- Define and scope the problem with data. What does the **scope of the problem** reveal about the areas that need coordinated attention?

- What **existing** coalitions and collaborations already exist that can be built upon?

- Are there **cross-cutting issues** such as data or policy that are required to support the efforts of content areas?

The Art

- Sense where the **energy** is in the system

- Capitalize on the where there are **strong leadership** and champions

- Balancing **inclusivity** and representing the system with a **manageable group size**

Juvenile Justice in Douglas County, NE: a complex system!

Douglas County's process and structures included both the **expected and unexpected partners**

Across Douglas County, our vision is a **comprehensive**, **coordinated**, and **community-wide** approach to **juvenile services** that **eliminates** the need for youth involvement with our justice system while maintaining **public safety**. For **all youth** who do enter our justice system, our goals are to provide **effective**, **compassionate** and **individualized** support that empowers youth and their **families** to **succeed** and to build an environment of **mutual trust and accountability**.

Steering committee

20 leaders from
- County government
- Juvenile court
- Legal community
- Probation
- Detention
- Law enforcement
- Service providers
- Philanthropy
- School system

Youth Council

15-20 former or current system involved youth ("Juvenile Justice League")

Work group — Chair, Chair
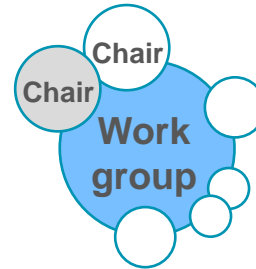
7 Work Groups with a total of over 120 people
- Families
- Schools
- Prevention
- Case processing
- Equity
- Data
- Policy

Community

300+ stakeholders engaged through
- Interviews
- Focus groups
- Community events
- Site visits
- Online forum

Backbone Executive Director | Program Manager | Data Analyst

The Work of the Work Groups

Melissa Oomer
FSG

Sample six month work group focus, to identify systems-level approaches to change

Month	WG Focus
1	**Form a group, build trust and common ground**
2	**Identify the systems-level problem for our WG to solve and the players involved to do so**
3	**Review baseline data and evidence of 'what works' to address structural barriers and inequities**
4	**Apply local knowledge and context to develop systems-level strategies**
5	**Discuss key decisions and develop ways to measure our progress and success**
6 +	**Implement strategies by identifying the who, what, and where to make them a reality**

What do we mean by strategies to achieve systems change?

1. **Better understanding the current situation:** aligning or overlaying existing data sets or systems with one another

2. **Learning by trial:** identifying an opportunity to start small with willing partners, learn from the experience, and then expand or replicate

3. **Increasing coordination:** finding ways to realign existing programs, protocols, and stakeholders to work together differently to maximize efficacy

4. **Enhancing services:** adopting a previously unnoticed proven practice from inside or outside the community to enhance existing services or programs

5. **Identifying policy-change opportunities:** looking for opportunities at local or state levels and relaying these to a Steering Committee and/or a policy and advocacy Working Group

Working group must also be vigilant about **equity and inclusion**

- *How do we effectively **integrate community voice** into institution-heavy collective impact efforts?*

- *How do we authentically and meaningfully **involve communities who have historically been left out** of decision-making processes?*

- *How do we engage stakeholders in sensitive **conversations about race, class and culture** without driving away those who need to sit at the problem-solving table?*

1 A **common language** is useful to help communities engage in constructive conversations

2 We need to be clear on **who we mean** by the community

3 We need to recognize the difference between **equity and equality** in community engagement

4 We need to more carefully **redefine power** in collective impact efforts

A Story from Omaha, Nebraska

Amber Parker
*Operation Youth
Success*

The schools group focused on different "parts of the problem" between juvenile justice and education

Membership included:

- Juvenile probation
- County attorney office
- Public defender office
- Juvenile court judges
- Juvenile justice service providers
- School leadership and administration
- Teachers
- Social workers
- Non-profits
- Child welfare agencies

The scope focused on:

Education System

Juvenile Justice System

Absenteeism

School based arrests

School re-entry
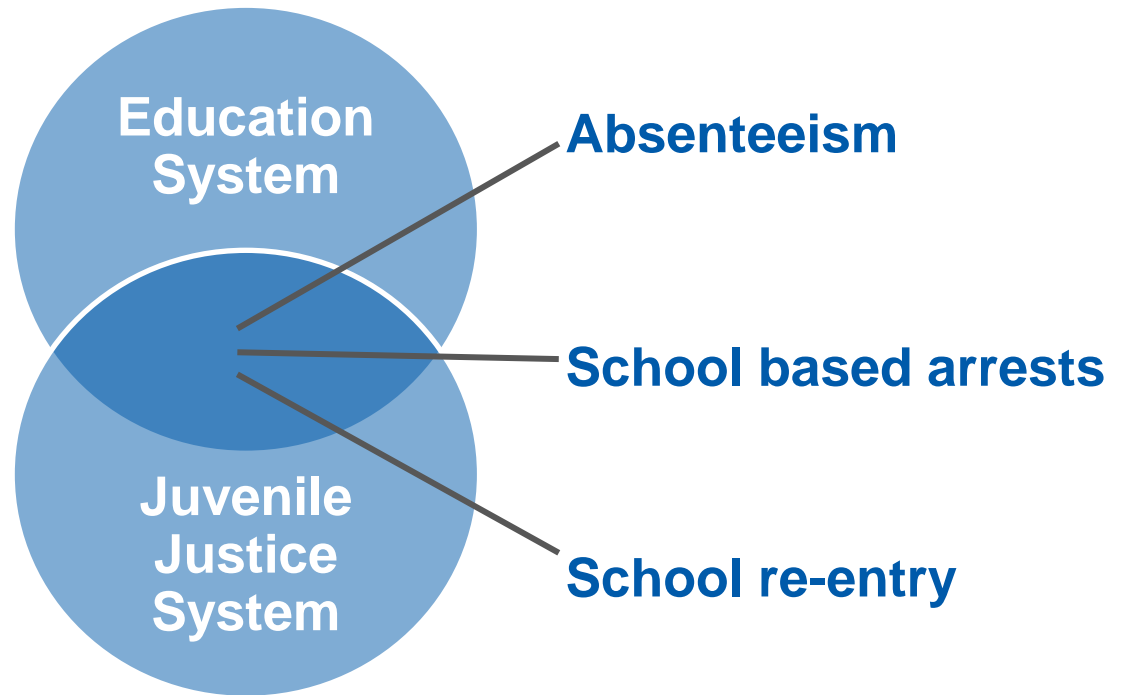
The schools group first focused on strategies to **reduce-school based arrests**

The work group's systems-change strategies included:

1. **Pilot project called the "School Justice Partnership"** to increase coordination among school resource officers, administrators, and probation officers

2. **Community wide-trainings for police officers on:**

   – **Teenage brain** development and consequences for discipline

   – **Legal consequences** of juvenile justice involvement

3. **Policy change from the Omaha Police Department** to nationally certify all their School Resource Officers

The schools group's success was enabled by several **"essential intangibles"**

Identification of **existing momentum** to build upon

Relationship and trust building over time that led to mindset shifts and greater openness to change

Creating a **culture of learning**

Fostering **connections** between people to identify points of disconnect

Leadership Identification and development

Worksheet #2: Strategy Development

- **On your own, use the worksheet (pages 2-3) to :**

  - Write down a current or potential working group strategy for your effort

  - How is this / could this strategy creates change in the system vs. in programs?

  - How did / could this strategy engage the community?

  Be prepared to share your reflections and outstanding questions with other webinar participants

Submit Your Questions for Q&A!

Melissa Oomer
FSG

Amber Parker
Operation Youth Success

Lauren Smith
FSG

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Sustaining Collective Impact
November 13, 2017

Using Data for a Collective Impact Refresh
December 6, 2017

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Appendix

Community engagement essential throughout collective impact initiatives

Components for Success	Phase I Assess Readiness	Phase II Initiate Action	Phase III Organize for Impact	Phase IV Begin Implementation	Phase V Sustain Action and Impact
Governance and Infrastructure	Convene community leaders	Identify champions and form cross-sector Steering Committee "SC" to guide the effort	Determine initial workgroups and plan backbone organization	Launch work groups "WGs" and select backbone organization	Building out the backbone organization; evolve WGs to meet emergent strategy
Strategic Planning	Hold dialogue about issue, community context, and available resources	Map the landscape and use data to make case	Create common agenda, clear problem definition, population level goal	Develop Blueprint for Implementation; identify quick wins	Refine strategies; mobilize for quick wins
Community Engagement	Determine community readiness; Create a community engagement plan	Begin outreach to community leaders	Incorporate community voice - gain community perspective and input around issue	Engage community more broadly and build public will	Continue engagement and conduct advocacy
Evaluation And Improvement	Determine if there is consensus/urgency to move forward	Analyze baseline data to ID key issues and gaps	Develop high level shared metrics and/or strategies at SC level	Establish shared measures (indicators and approach) at SC and WG levels	Collect, track, and report progress (process to learn and improve)

Backbone teams are critical to the entire process

Guide Vision and Strategy
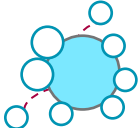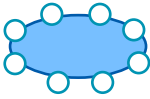
Support Aligned Activities

Establish Shared Measurement Practices

Cultivate Community Engagement and Ownership

Advance Policy

Mobilize Resources

Each Stakeholder and Group Plays a Specific Role

Stakeholder / Group	Description and Role
Community partner	• **Individual organizations and members of the community** (e.g, nonprofit, funder, business, public agency, student, parent, resident) • Partners should have **access to a variety of opportunities to learn about and engage** in the initiative
Work Group (a.k.a. network, action team)	• Comprised of **cross-sector community partners targeting particular element of common agenda** (e.g., early childhood, K12, postsecondary, OST, data, policy, funding) • Designs and implements a targeted **action plan,** involving non-work group members as needed • Led by **two co-chairs** willing to invest time and (ideally) staff capacity • Some groups or networks serve **slightly different functions**, e.g., funders group (to identify opportunities for alignment), or inclusive community network to raise awareness about project and provide mechanism for vetting actions
Steering Committee (Strategy Group)	• Comprised of **cross-sector community partners** (representative of the large ecosystem) • Provides **strategic direction** for the initiative and **champions the work** • In some cases, committee members are **chairs for action teams**
Backbone	• Provides **dedicated staff** • Supports the work of partners by assisting with **strategic guidance**, supporting **aligned activity**, establishing **shared measurement**, building **public will**, advancing **policy**, and mobilizing **funding**

What should work groups focus on accomplishing in the first six months?

- Using **data** to further understand the problem and developing an approach to continuous learning

- Identifying high-leverage **strategies** and **quick wins**

- Building **relationships** among members and maintaining a sense of excitement

- Transitioning from relying on the backbone to **relying on co-chairs** to lead and manage the activities (and meetings) of the work group

A Strong Steering Committee Is Important for Building the Initiative's Credibility and for Bringing Other Stakeholders to the Table

Responsibilities of Steering Committee Members

➢ Guidance, Vision, and Oversight
- Develop and refine Common Agenda for change, including problem, goal(s), and guiding principles
- Use data to inform strategy development learning
- Track progress of work using agreed-upon indicators at Steering Committee and working group levels
- Make connections between working groups to ensure coordination and efficiency
- Interact with the backbone entity on strategy, community engagement, and shared measurement

➢ Leadership
- Considering how your individual organization or those in your network can align to the Common Agenda
- Serving as vocal champions of the collective impact effort in the community

➢ Process
- Participating in the regularly scheduled meetings in person (every 4-6 weeks)
- Reviewing pre-read materials prior to meetings and coming prepared for engaged discussion, active listening, and respectful dialogue
- Committing to yearlong membership of the Steering Committee

Steering Committee Members Should Be Carefully Recruited

Sample Traits

1. **Decision Maker**. CEO/President Level - Able to drive systems change relevant to effort

2. **Representative**. Geographic coverage of effort (counties and subregional steering committees) as well as sector

3. **Influential Champion**. Commands respect of broader set of stakeholders (and perceived so). Can bring stakeholders to the table and keep them there. Can champion the strategy with the broader community

4. **Content Expertise/Practitioner**. Familiar with subject matter to contribute substantively

5. **Passion and Urgency**. Passionate about issue and feels real urgency for the need to change

6. **Focused on the Greater Interest**. Represents need of their own organization but able to think and act in the greater interest of the community

7. **Commitment**. Willing and able to commit time and energy to attend meetings and get work done

8. **Lived Experience**. Bring experience with the issue and as a likely beneficiary of the initiative

Quick Wins

It is helpful to seed quick wins to maintain momentum and strengthen relationships

By bringing a cross-sector group of stakeholders working on similar issues together, new opportunities for "quick wins" emerge – small projects or changes that could lead to significant benefits.

Quick Win Overview

- **What is a quick win?**
  - A strategy in which you expect implementation and outcomes in next 3-6 months
  - Requires a limited amount of resources (e.g., money, time, people)
  - Results will be outputs and outcomes at the population level (e.g., connection to a new opportunity, not a reduction in BMI, or increase in graduation rates)
  - Results may be among a target population and/or target geography (e.g., not all children in a county)

- **How does a quick win fit in with our longer term strategies?**
  - A quick win should align with at least one of the strategy areas
  - It may be drawn directly from the plan, or aligned with the larger strategy areas

The group in Dallas brainstormed potential quick wins based on areas of momentum

Encourage Breastfeeding

- Tactic - Breastfeeding
  - **Work to scale existing programs to help Parkland and Methodist hospitals become baby-friendly by 2014**

Coordinated School Health Plan

- Tactic - Identify ways to help support implementation of the Coordinated School Health curriculum
  - **Catalog curriculum and contact for each district**
  - **Starting with DISD plan, compare to the CSH guidelines to better understand gaps and opportunities**

Taste Testing with Kids

- Tactic - USDA School Breakfast and School Lunch program
- Tactic - USDA and Texas Dept. of Agriculture healthy food programs
  - **Partner with several institutional providers (schools, after school programs, summer feeding programs) to do taste-testing with kids to:**
    - **Teach them about healthy foods**
    - **Learn how to make healthy food appealing to students**

They also looked at other initiative best practices to generate quick wins ideas

Food Assistance Guide

- The Childhood Obesity Initiative of San Diego **created a food assistance guide and encourages physicians to provide it to patients**:
  - List of farmer's markets that accept Supplemental Nutrition Assistance Program (SNAP) credits
  - Community garden options
  - Food assistance programs & eligibility requirements
  - Information on school breakfast and lunch program sign-ups

Safe Routes to School

- Program included **teaching kids about bike safety, a walking bus, and a count by teachers of how students got to school**
- Six schools were participating in a pilot program. Within the first year those schools saw a 5% increase in walking/biking to school.

Farmer's Market Coupons

- Farmer's markets and food pantries coordinated to **give qualifying households coupons to use for fresh produce or dairy at participating farmer's markets**
- Farmers were reimbursed by the food pantries for purchases by qualified families

A simple tool was used to help prioritize across potential quick wins

Quick Wins	Implementation/ Outcomes in 3-6 Months	Requires Limited Resources	Aligns with one of the Strategy Areas
A: Encourage Breastfeeding			
B: Coordinated School Health Plan			
C: Taste Testing with Kids			
D: Food Assistance Guide			
E: Safe Routes to School			
F: Farmer's Market Coupons			
G: Other			

Example: Tasty Teaser Coordination and Amplification

Goal	Relevant partners provide volunteer support to DISD's Tasty Teasers program in select schools to give children 8-12 opportunities to taste oranges by having taste testing twice a week at each school over the lunch period for one month.

Partners & Roles

DISD	• Cafeteria managers host volunteers • Provide food • Teacher encourage taste testing
Coordinating Agencies	• **WIC:** Makes recipes available in clinic sites in English/Spanish; parent taste-testing • **ChildCareGroup :** Host coordinated test tasting at the Oak Cliff/Bock Center • **Churches**: Blessed Sacrament, Cliff Baptist Temple, Christ Episcopal Church • **North Texas Food Bank**: Making the monthly food drops at Botello, Bowie and Garcia oranges for March
Volunteers	• **Steering Committee** • **Work Groups** • **Networks of Steering Committee and Work Groups**
Schools	Targeted schools are Bowie Elementary School, Botello Elementary School and Garcia Middle School

DISD Tasty Teasers- Oranges

# DISD Tasty Teasers- Oranges

Dallas ISD Health/PE @DallasHPE · Mar 17

Serving Tasty Teasers at Bowie Elementary - blueberry/orange parfaits - yummy! #DallasHPE#THR@UWMD

Dallas ISD Health/PE @DallasHPE · Mar 17

Mr. McElroy, you ROCK! Thanks for encouraging your students to try the fruit parfait Tasty Teaser at Bowie Elem.!

Dallas ISD Health/PE@DallasHPE Mar 4
Tasty Teasers Charting the Course for a Healthy Future **@UnitedWayDallas** Felix G. Botello Elem **#DISDHPE**
pic.twitter.com/YXF21yT5vp

From Idea to Impact

From idea…
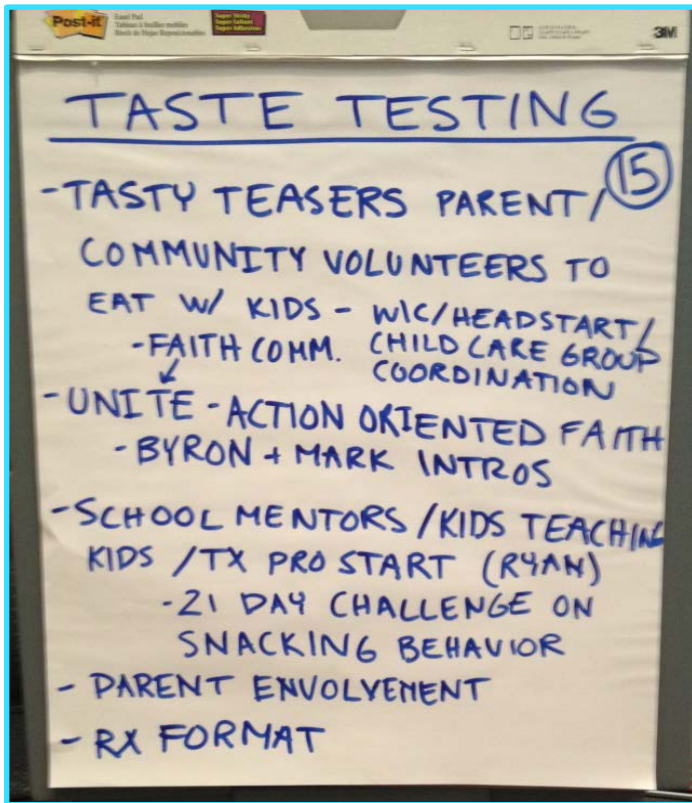
…to impact!

- # children reached: approximately 2,006

- # partner organizations:

  11, three schools and eight other community organizations

Qualitative Learning from Tasty Teasers

- **Partnership**: What did we learn about effective cross-sector collaboration?

  – If you have a **specific ask**, organizations will want to join a great effort!

  – Partners may emerge just because of **momentum** around the effort

  – Adding partners quickly becomes very **complex** and requires **more time** to manage, including managing **information flows**

- **Volunteers**: What did we learn about the experience of working with volunteers?

  – Volunteers bring their own **unique talents**, enhancing the strategy in ways we could not have planned for (e.g., giving the pitch on why tasting is cool)

  – You can't underestimate the power of **connection-** between volunteers and school staff, volunteers and kids, volunteers and partner organizations

- **Communications**: What worked well in communicating information to stakeholders?

  – Utilizing **existing communications channels** (e.g., flyers, billboards) to provide relevant information is key

  – You might have the **chance** to use a channel you didn't plan for (e.g., radio interview), and need to be prepared to take advantage of it as best you can