Affordable Learning & Financial Support Collective Impact Working Group

These templates provide guidance for a series of working group meetings; the number and specific content of meetings should be tailored to the particular initiative and group context.

Note: It is good practice for the backbone (or facilitator if the backbone is not yet in place) to conduct one-on-one interviews with all working group members before the first meeting. In addition, meetings may be held in a consistent location or can rotate so that different group members "host" the meeting each month and have an opportunity to share their promising practices. Consider the pros and cons of hosting the meeting virtually vs. in-person to support inclusion and maximize participation.

Meeting 1
Objectives: Build rapport, understand the proposed initiative, develop a shared vision, review the role of Extended Studies as backbone support.

<Insert Meeting Date and Time>

<Insert Address of Meeting Location>

    I.   Introduction
        a. Welcoming statements
        b. Overview of the agenda and meeting purpose
        c. Key objectives of collective impact at UC San Diego and the role of Extended Studies

    II.   Why It's Important for Me to Be Here Today
Given the group's purpose, discuss what excites members and motivates them to be part of this working group. How do their work, values, and professional strengths relate to the initiative? What different perspectives do they bring to the group and how can they inform the group's approach?

    III.   Scanning the Environment & Asset Mapping
What are current strengths, assets, and innovations that the working group should build on, including other initiatives, best practices, existing partnerships/collaborations, and strategies? What are the challenges and opportunities facing the group – what are the major trends, strengths, gaps, challenges, and opportunities in different contexts?

    IV.   Setting Our Intention
        a. Discussion of proposed initiative/working group and summary of pre-meeting conversations
        b. Overview of the collective impact approach at UC San Diego and examples/case studies (e.g. Summer Bridge)
        c. Working group structure and planning timeline

V.   Envisioning the Future & Moving from Vision to Mission

What does success look like? What are the major outcomes and results we hope to achieve for the target population and other stakeholders? Consider strategies/priorities related to program design and innovation, collaboration and system alignment, data needs, technology, policy change, outreach and awareness, support, and resources

What is your role as leaders of this initiative in creating or inspiring these outcomes and changes? Consider areas such as innovation, communication and awareness, sustainability, implementation, and advocacy

VI.   Summary and Next Steps

Meeting 2

Objectives: Identify the principles of the initiative and define the group's common agenda and action plan.

<Insert Meeting Date and Time>

<Insert Address of Meeting Location>

I.   Welcome and Introduction
   a.   Welcoming statements
   b.   Overview of the meeting purpose and agenda

II.   Identifying Our Principles

The objective is to lead the group in a discussion to articulate guiding principles for the initiative and working group, answering the question, "What are the core beliefs that will serve as the foundation for our work?"

III.   Defining Our Common Agenda

The objective is to reaffirm the group's understanding of the problem, define a vision for the initiative, and begin to name specific outcomes.

IV.   Summary and Next Steps

Meeting 3

Objectives: Refine the Common Agenda, present success stories from across the field, and understand system change levers.

<Insert Meeting Date and Time>

<Insert Address of Meeting Location>

    I.   Welcome and Introduction
- a. Welcoming statements
- b. Overview of the meeting purpose and agenda

    II.   Review & Refine Common Agenda

              The objective is to review and refine the vision, principles, and outcomes generated during meetings 1 and 2

    III.   Success Stories

              Share stores from other successful collective impact efforts in the field as well as best practices and success stories from existing initiatives, programs, etc., across the university community. How can this working group learn from and build upon these successes?

    IV.   Discuss Desired Future State of the System and Change Levers

              Share and discuss baseline data on the current state of the system, target outcomes, and interventions

              Discuss each phase along the initiative continuum. For example, a workforce development-focused effort could discuss: a) participant entry, b) education and training, and c) career entry and advancement.

    V.   Summary and Next Steps

Guidance for Subsequent Meetings

The next several meetings, roughly through the end of the initiative's first six months, can take a variety of formats, depending on the content of the work, dynamic of the group, and expertise of its members. Suggested objectives for these meetings include:

- Quick-Win Brainstorming
  - Identify potential small pilots or "quick wins"; these are an important part of an initiative beginning to work together
- Development of Working Group
  - Continue to refine the scope of the working group and sub-groups or task forces in alignment with the overarching initiative
  - Recruit additional working group members as needed and forge partnerships with other initiatives and working groups across the collective impact network
- Planning for Evaluation
  - Identify evaluation needs and develop plans for continuous learning/improvement
- Articulation of Communications Messages
  - Develop talking points and "elevator pitch" for members to champion the initiative within the community