

Career Readiness and Living-Wage Work Pilot: Review of the Grantee Engagement Process



The **James Irvine**
Foundation

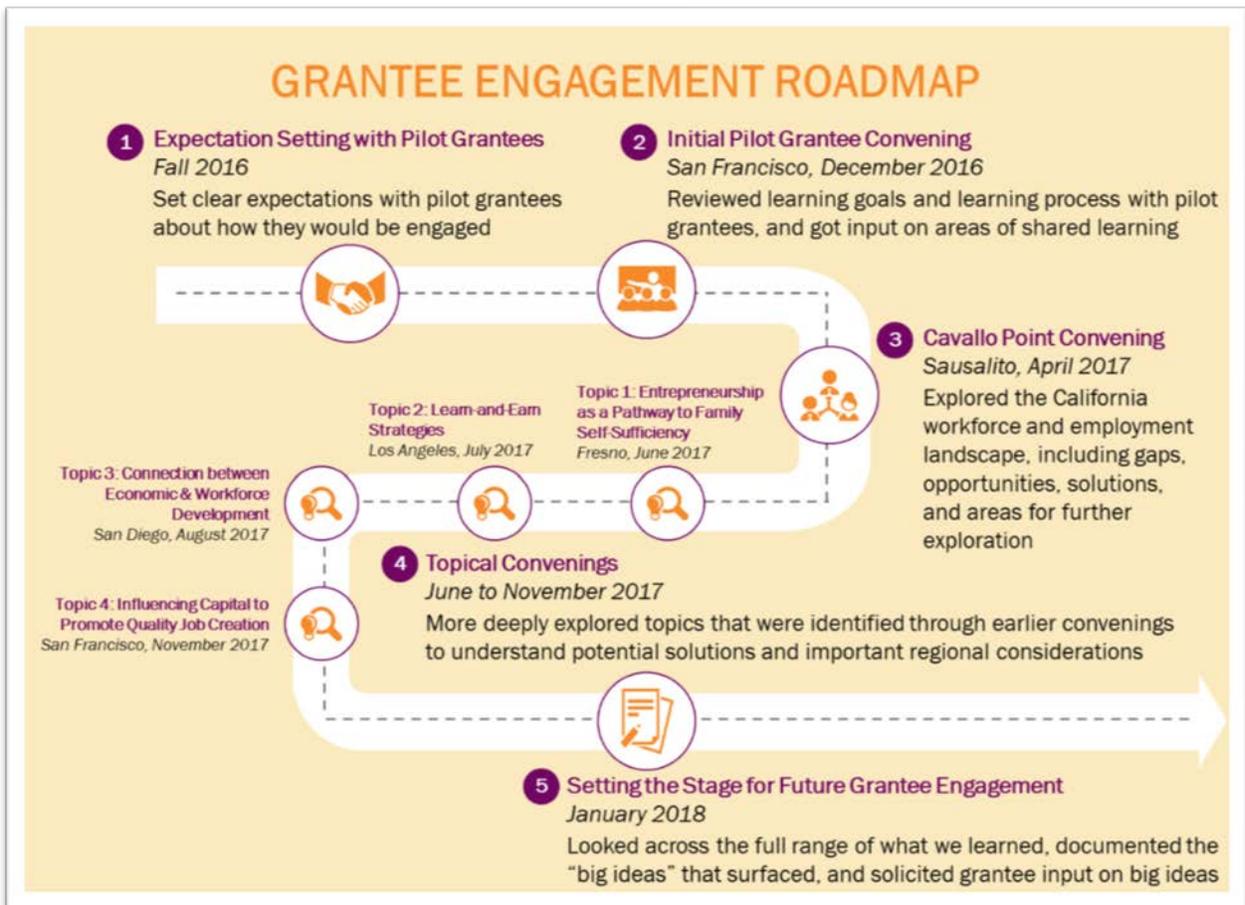
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1) Executive Summary

Over the course of the past year, The James Irvine Foundation’s Career Readiness and Living-Wage Work Pilot (CRLWW) team undertook a comprehensive effort to engage grantees and incorporate their input during the development of the initiative. While it would be impossible to capture the full array of touchpoints, conversations, and meetings between Irvine program staff and grantee partners, there were several critical milestones in the year-long process. Together these milestones make up the “roadmap,” depicted below, that the CRLWW team followed to gather and incorporate grantee feedback as the team developed and refined the strategy for the initiative.



Reflecting on this full process, the following **key learnings** emerged:

- **Building grantee trust takes time.** One of—if not the—most important factor to getting quality grantee feedback is earning grantees’ trust. To do so, it was critical to clearly note Irvine’s goals, the process the Foundation was following, why the team was soliciting grantee input, how that input would be collected, and how grantee feedback would be used. The team repeatedly emphasized these points at each step in the process. Additionally, the team embarked upon this process of asking grantees for their input *after* grantees’ organizations had already received multi-year grants, which helped mitigate grantees’ concerns and enabled them to be more open during the process.

However, even with these efforts, the CRLWW team learned that it still takes time for grantees to “believe” that a foundation truly wants their unvarnished ideas, perspectives, and hunches. There is a prevailing notion among nonprofit leaders that they must always pitch their organization’s work or interventions when in the presence of funders—and that they should try to confirm or validate a funders’ point of view, rather than voice a dissenting opinion. It took roughly three to six months of regular engagement for grantees to

understand that Irvine was not trying to force them to collaborate with each other nor rubber-stamp a pre-determined strategy, but rather to help the Foundation shape its emerging initiative.

- **Planning for – and embracing – emergence is important.** While the broad contours of the roadmap took shape in early 2017, many pieces emerged organically throughout the year. For instance, the team knew that it would bring together grantees at Cavallo Point Lodge in Sausalito, CA, in the spring of 2017, but the topics to be discussed only became clear after many interviews with grantees. Additionally, the desire to have topically-focused convenings emerged early on, but the exact topics and scope of what to explore weren't finalized until weeks (or sometimes days) before the convenings. Lastly, the CRLWW team couldn't predict that a list of "big ideas" to explore further and potentially fund would manifest by the end of the grantee engagement process, but the team incorporated this into the process as it recognized the practical value of such a list.

Instead of feeling discomfort with the "messiness" inherent in a process such as this one, it was important to embrace the emergent and dynamic nature of the grantee engagement process. Working in this way enabled the team to make adaptations and refinements to the initiative plan along the way that made the ultimate plan even stronger. It also fostered positive feedback loops: grantees became even more engaged as they saw the team shift its plans in response to their input, which in turn increased their willingness to engage and offer more helpful feedback.

- **Convening conscientiously helps send the right signals.** Over the course of the process, the CRLWW team brought together dozens of leading field experts to hear their perspectives on the current state of the field, imagine new possibilities, and advise the Foundation on potential paths forward. Recognizing the significance of this ask, the team made it a priority to treat participants well by designing high quality experiences that included high-end accommodations and food, ample networking time, and thoughtfully constructed agendas and pre-reads.

Additionally, the CRLWW team recognized the importance of the signals that these convenings would send. The team was careful to frame the meetings as exploratory, thank participants for their input, and note that Irvine's Board of Directors would be the ultimate decision-makers on the initiative strategy. The team agreed that even if the Board chose not to go down a certain path, the team's goal was to leave each group better off as a result of coming together – through stronger connections, a base of relevant research conducted on the topic, and a retreat-like setting to step out of their day-to-day work and think expansively.

- **Anticipating and planning for the "after" should not be overlooked.** Due to the condensed timeline of the convenings, the team's attention after convenings tended to quickly shift to the next step of the process. At times, an overlooked element was following up with participants of previous convenings to share back synthesis documents and updates from the convenings. Because the initiative's strategy was still under development, team was concerned that any "findings" from these convenings could send premature signals about Irvine's potential direction. Additionally, the team had questions about what should be shared back with participants and what, if anything, could be written up and shared broadly with the field. With the tight timeline and these open questions still in play, post-convening follow-up with participants was often delayed.

By the end of the process, the CRLWW team agreed that sharing a documentation of the conversation from each meeting was the best course of action. Since these meetings weren't designed to build consensus or find a single answer, a simple synthesis (along with a small thank-you gift) was valuable for the field and showed appreciation. And with the benefit of hindsight, the team realized that it would have been premature to share any outward-facing blogposts or public communications until after the Board had approved the plan for the initiative.

- **Striking the right balance of time, cost, and effort is an important consideration.** Executing this roadmap took a significant amount of time and resources. Internally, the CRLWW team played the lead role in setting grantee expectations, orchestrating the first grantee convening in December 2016, approving convening topics and agendas, coordinating meeting logistics, and managing grantee relationships throughout the process. The team also engaged Monitor Institute by Deloitte to interview convening participants, document the topics grantees wanted to discuss, research each convening topic, create the convening agendas and pre-reads, facilitate the convenings, capture convening discussions, develop convening syntheses, and write blog posts to publicly share Irvine's perspectives.

This division of effort generally worked well and allowed the CRLWW team to extend its reach while also being responsive to grantees' needs. And while Monitor Institute managed most of the pre-convening

outreach and meeting design, the CRLWW team carefully managed relationships by extending invitations, answering questions, and handling grantee follow-up.

The team also considered the “cost to the field” for this level of engagement. As a steward of resources and as leaders in the social sector, the CRLWW team felt that it was important to make the most of this time and ensure that participants were treated well and that they participated in expertly designed experiences.

- **Measuring success along the way could make this type of process even better.** Subjectively, this grantee engagement process was successful on many measures—grantees shared positive feedback throughout the process, program officers formed deeper relationships with grantees, the CRLWW team garnered valuable input to strengthen the initiative design, and the team also concluded the process with a list of ideas ripe for additional exploration.

Looking ahead, it would be helpful to balance these qualitative measures of success with additional objective measures. For instance, post-convening surveys could be fielded to assess grantee satisfaction with the meetings. A similar survey could be fielded to assess grantees’ satisfaction with the process as a whole. To show connections formed, a social network mapping exercise could be undertaken to understand new connections made and partnerships formed because of these new connections. And to help enhance Irvine’s own branding and communications, teams could create more concrete goals around messaging, branding, and knowledge sharing.

The following section provides detail about each of the five steps on the roadmap, including the objectives of each step, what the CRLWW team did to execute, what worked well, and what points of tension the team managed. Full syntheses from these convenings can be viewed on our website: www.irvine.org/learning. For teams looking to design their own grantee engagement processes, this detailed recap provides a blueprint for how to design meaningful interactions for gathering and incorporating grantee input.

2) Detail: Grantee Engagement Roadmap

2.1) Expectation Setting with Pilot Grantees (Fall 2016)

As the CRLWW team kicked off this process in the fall of 2016, it strived to design an engagement process that emphasized deep listening and learning from grantees. It was important in the first stage of the process for program officers to set clear expectations about what the engagement process would look like and how they expected grantees in the pilot phase to participate, even as the process was emergent.

Timing	<ul style="list-style-type: none"> • Fall 2016
Objective(s)	<ul style="list-style-type: none"> • To set clear expectations with pilot phase grantees on how they would be engaged and ensure that Irvine met those expectations
What We Did	<ul style="list-style-type: none"> • Conducted one-on-one conversations: The CRLWW Program Officers (POs) engaged in one-on-one conversations with prospective pilot phase grantees to describe the process, set expectations, and test their interest and willingness to participate. Key messages included: <ul style="list-style-type: none"> ○ What it meant to be a pilot phase grantee: POs emphasized that mutual learning was a key part of the relationship with the Foundation during the pilot phase ○ The bounds within which Irvine was seeking input: POs shared the Foundation’s high-level goals related to economic and political opportunity as well as the Better Career team’s mandate to explore issues related to career pathways and ways for workers to earn family-sustaining wages. This guidance provided the bounds within which the team was seeking input, but still allowing grantees to provide a wide range of feedback

	<ul style="list-style-type: none"> ○ The learning questions Irvine was most interested in: In addition to sharing the broad parameters of the initiative, POs also shared the learning questions that Irvine was most interested in exploring during the pilot phase ○ The emphasis on “learning alongside” grantees: The team used language like “<i>you are the experts</i>”, “<i>we are learning with you</i>”, and “<i>we need your input</i>” to emphasize that they wanted to learn alongside grantees ○ The time commitment required: POs were clear that grantees should be willing to participate in quarterly phone check-ins with POs, attend 2-3 convenings over the course of the year, and participate in pre-convening interviews to shape the agendas for the convenings ● Reinforced messages via blog post by Irvine’s CEO: The messages delivered by POs were reinforced by foundation leadership through a February 2017 blogpost by Irvine’s CEO that used language such as: <ul style="list-style-type: none"> ○ “<i>We wanted to help them [grantees] expand their impact, while also learning from their work</i>” ○ “<i>For each grantee, we also set out learning questions that would inform our efforts to develop new initiatives in the grantee’s area of work</i>”
What Worked Well	<ul style="list-style-type: none"> ● Grantees’ eagerness to participate: Grantees appreciated that they were asked to contribute to shaping the initiative’s strategy and could engage in the work at the right level ● Transparency around engagement expectations: <ul style="list-style-type: none"> ○ Grantees appreciated having clarity around the expectations and timing required to participate, enabling prospective grantees to have frank conversations with POs about their ability to participate ○ Grantees didn’t push back on the time commitment—in fact, some later said that Irvine was overly concerned about taking too much of their time
Points of Tension	<ul style="list-style-type: none"> ● Grantee skepticism: It took time for grantees to “believe” that the CRLWW team truly wanted their open and honest input, so it was important for POs and Irvine’s leadership to consistently reemphasize the message and ensure the team’s actions backed up the messages to grantees

2.2) Initial Pilot Grantee Convening (December 2016)

To formally kick off the grantee engagement process, the CRLWW team invited pilot phase grantees to an initial convening to discuss the learning agenda for the initiative. During this convening, the team reviewed its learning goals and learning process with grantees and solicited their feedback. This input helped the team refine its learning plan and set the stage for the second grantee convening in April 2017 at Cavallo Point.

Timing	<ul style="list-style-type: none"> ● December 5, 2016
Objective(s)	<ul style="list-style-type: none"> ● To provide information about the initiative development process and the pilot phase, share the CRLWW team’s learning objectives and plan, and get input on areas of shared learning
What We Did	<ul style="list-style-type: none"> ● Designed the agenda: This convening was designed to provide transparency to grantees about what Irvine was hoping to learn, the process by which the CRLWW team would seek to learn, and how the team and grantees could learn together. As such, the team designed an interactive 3-hour session that included:

	<ul style="list-style-type: none"> ○ A peer-to-peer facilitated lunch with the Fair Work Initiative: Each initiative hosted a separate convening, but co-hosted a lunch with grantees from both the CRLWW and Worker Voice initiatives to foster cross-initiative connections and learning ○ A presentation and facilitated discussion of Irvine’s learning plan: The CRLWW team shared its learning goals and objectives and its draft learning plan, and facilitated a group discussion to solicit feedback on the learning plan, both on its content and approach ● Sent invitations to grantees: In the email invitation, information was shared about the session’s objectives, the high-level agenda, Irvine’s learning questions, and logistical details about the event ● Facilitated the event: The two-part session involved coordination and facilitation by staff members from across the Foundation: <ul style="list-style-type: none"> ○ Cross-initiative lunch session: Two staff members joined each pre-assigned table, one to facilitate and one to take notes ○ Presentation and discussion of learning plan: Irvine first framed the learning goals in the context of the broader initiative design process, then presented the draft learning plan to grantees, and then facilitated a group discussion and captured grantee input about the learning questions and overall learning plan ● Followed up with grantees: The team followed up with grantees to thank them for their participation and preview future opportunities to gather grantee input
<p>What Worked Well</p>	<ul style="list-style-type: none"> ● Cross-initiative lunch: Several helpful topics surfaced during the cross-initiative lunch, such as: <ul style="list-style-type: none"> ○ Policy opportunities: Both sets of grantees brainstormed ways they could work together on important issues ○ Importance of stepping out of the day-to-day: Grantees provided feedback that it was refreshing to think more expansively than they typically do on a day-to-day basis on a range of issues about the nature of work ● Framing and context-setting: This initial convening set the stage well for additional co-learning in 2017 by outlining the goals and process so that future meetings could focus exclusively on content ● Reinforcing messaging that Irvine was open to feedback: The meeting also reinforced that the team was open to feedback on the learning plan and was ready to act on it. For example, grantees noted that the CRLWW team should be mindful to get employer input, and that feedback spurred additional planning on employer engagement
<p>Points of Tension</p>	<ul style="list-style-type: none"> ● Workload on the team: The CRLWW team shouldered the brunt of the meeting design, logistics management, and facilitation burden for this meeting. In addition to the time commitment, it also created the dynamic of staff being “front of the room” presenting to grantees as opposed to being alongside grantees

2.3) Cavallo Point Convening (April 2017)

After the initial convening, the CRLWW team invited a broader set of pilot phase grantees and select field experts to participate in a one-and-a-half day convening at Cavallo Point in Sausalito, CA. While the first convening focused on soliciting grantee feedback on Irvine’s approach to learning, this second convening focused on exploring topics in which grantees had interest, helping us to collectively understand the various efforts taking place across the

workforce and employment ecosystem in California. After discussing these topics, the grantees then shared their input on the CRLWW initiative design, including important details like budgeting and timelines.

<p>Timing</p>	<ul style="list-style-type: none"> • April 13-14, 2017
<p>Objective(s)</p>	<ul style="list-style-type: none"> • There were four stated objectives of the meeting: <ul style="list-style-type: none"> ○ Learn from each other to help advance the work each organization is doing ○ Better understand the workforce and employment landscape in California ○ Explore specific gaps and opportunities across a range of topics ○ Gather input on solutions, including potential investments for Irvine • The team also had an additional “hidden” objective: <ul style="list-style-type: none"> ○ Surface interesting topics to explore further over the spring and summer of 2017. Thus, the design of the convening allowed for the group to touch on a wide range of topics, rather than focusing on a select few
<p>What We Did</p>	<ul style="list-style-type: none"> • Developed high-level convening objectives and design principles: The team first aligned around a rough set of objectives and design principles, which it then road-tested with participants and refined over time • Sent invites and conducted 45-minute interviews with all participants: To make the most of our time together, Monitor Institute interviewed all participants in advance. While the total time spent conducting these interviews exceeded the time the group spent together at the convening, these conversations ensured that participants were coming into the room with the right mindset, surfaced content areas to discuss, and enabled us to maximize our time together. In these interviews, Monitor Institute: <ul style="list-style-type: none"> ○ Reminded participants of the high-level bounds of the initiative and Irvine’s approach to learning and grantee engagement ○ Shared convening objectives and relevant design principles ○ Asked about the participant’s own work, including the critical elements and challenges ○ Solicited input on what they saw as the needs and opportunities across the workforce and employment ecosystem topics ○ Solicited input on what they would be most interested in exploring at the convening • Conducted supplemental expert interviews and made a small number of additional invites: Monitor Institute conducted an additional set of ~10 interviews with select field experts. Based on the conversations, the team made decisions to extend a small number of additional invites (<5) to round out the perspectives in the room • Created a pre-read document: With interviews complete, the team created a ~20-page pre-read document that went out one week before the convening and included: <ul style="list-style-type: none"> ○ Convening objectives and agenda ○ An update on progress to date on the initiative design ○ A simple framework for capturing the all the ideas and topics surfaced through interviews, and the detailed themes related to each ○ Supplemental desk research that helped flesh out select topics that were surfaced

	<ul style="list-style-type: none"> ○ Participant bios ● Facilitated the convening: After framing remarks by Elizabeth Gonzalez, Program Director, and Christina Garcia, Senior Program Officer, Monitor Institute facilitated the one-and-a-half day convening, which was designed in the style of a three-act play: <ul style="list-style-type: none"> ○ Act I – Build Common Understanding: Participants discussed the topics identified in the pre-read, adding more color and walking around the room in small groups to meet other participants and engage with the content displayed on panels around the room ○ Act II – Explore Areas of Opportunity: Participants broke into small groups and discussed select topics identified during interviews that were also areas in which Irvine had interest ○ Act III – Provide Input into the Plan Going Forward: Attendees participated in an interactive exercise in which they served as “portfolio advisors”, sharing their input on how the CRLWW team could invest the initiative’s assets ● Created a detailed convening synthesis: After the meeting, the team created a detailed synthesis to capture what was discussed and document the advice that grantees shared
<p>What Worked Well</p>	<ul style="list-style-type: none"> ● Creation of a simple framework for capturing breadth of topics: One important, and difficult, part of creating the convening pre-read was creating a simple, yet comprehensive, framework to hold all the ideas discussed. Because participants touched on so many different parts of the workforce and employment landscape, it was important to choose a framework that lifted participants out of their day-to-day, was easily understood, and allowed them to see their work within the larger whole. After some trial and error, the team used a framework that captured: <ul style="list-style-type: none"> ○ “Supply-side” efforts that create career pathways for workers ○ “Demand-side” efforts that increase the quality and number of living-wage jobs and improve the hiring, retention, and advancement practices of employers ○ “Intersection” efforts that improve the efficiency and effectiveness of the interaction between the two sides ○ “System-wide” efforts that affect all parts of the workforce and employment ecosystem ● Acknowledgement of potential tensions in the room: The team was clear in the framing remarks about the role(s) Irvine wanted participants to play and the desired objectives for the convening, and acknowledged how these expectations may differ from other convenings they have attended. For example, we: <ul style="list-style-type: none"> ○ Asked participants to wear two “hats”: To avoid a situation in which participants felt the need to pitch the value of their organization’s work vis-à-vis others, Monitor Institute explicitly asked participants to wear a field-level expert “hat” in addition to their organization-level “hat”. This was an easier ask, since most participants already had multi-year grants with Irvine and didn’t feel near-term pressure to convince Irvine of the value of their organization’s work ○ Removed “collaboration” as a desired objective: Many organizations are accustomed to being encouraged by funders to collaborate. However, after some consideration, the team decided that “collaboration” was not an explicit meeting objective, which enabled a more open dialogue among participants and reduced pressure in the room, since grantees didn’t need to agree on a single path forward ● Use of the Portfolio Advisor activity for surfacing alternative initiative structures: The convening culminated with a “Portfolio Advisor” exercise in which pre-assigned small groups developed pitches for how they would allocate up to \$75M in initiative resources. This

	<p>exercise highlighted the diversity of thinking for how to structure investments, with some groups developing a statewide/regional framework, others allocating funds by direct service, policy, and communications, and still others choosing to allocate funds to a handful of important topics (e.g., apprenticeships)</p> <ul style="list-style-type: none"> • Quality of the physical space and behind-the-scenes logistics: When asking grantees for advice and to do hard thinking, it is important to treat them well. The beauty of the setting; the high quality of the hotel, food, and amenities; and decision to let participants bring their partners helped participants feel valued and in the right mindset to participate
Points of Tension	<ul style="list-style-type: none"> • Power dynamics during the Portfolio Advisor activity: While the activity was valuable for helping grantees to offer their advice and give Irvine input on the sensitive issue of portfolio allocation, it also produced some challenges. Grantees acknowledged that the exercise was harder than they expected, giving them a deeper appreciation for the work of the CRLWW team. In addition, some grantee and funder power dynamics surfaced whereby grantees were hesitant to share their ideas without understanding what Irvine wanted to fund—as well as tensions between grantees who may have had different priorities. The team and Monitor Institute worked to mitigate these tensions, but they never dissipated entirely as participants continuously asked what Irvine was interested in before sharing their own thoughts

2.4) Topical Convenings (June to November 2017)

Based on the discussions at the Cavallo Point convening, the CRLWW team identified a handful of topics, including regional variations, that were of interest to both grantees and Irvine. The team selected topics to explore more deeply through future convenings in select regions of the state. These topical convenings enabled the CRLWW team to obtain more detailed input around key topics, helping to inform the initiative plan and areas of potential funding.

Timing	<ul style="list-style-type: none"> • Topic 1: Entrepreneurship as a Pathway to Family Self-Sufficiency, Fresno, June 28, 2017 • Topic 2: Learn-and-Earn Strategies, Los Angeles, July 13, 2017 • Topic 3: Connection between Economic and Workforce Development, San Diego, August 3, 2017 • Topic 4: Influencing Capital to Promote Quality Job Creation, San Francisco, November 9, 2017
Objective(s)	<ul style="list-style-type: none"> • To more deeply explore a small number of topics identified through earlier convenings and interviews and understand what potential solutions could look like
What We Did	<ul style="list-style-type: none"> • Selected the topics: The conversations to date surfaced many possible topics to explore, making it challenging to choose the right set. The CRLWW team brainstormed a starting list and then narrowed down the list based on the topics' fits with the emerging initiative, grantee interest, and relevance in regions where Irvine had interest. The topics selected were: <ul style="list-style-type: none"> ○ Entrepreneurship as a pathway to family self-sufficiency, with a geographic focus on the Central Valley ○ Learn-and-Earn training programs, including apprenticeships, with a geographic focus on Los Angeles and the Inland Empire ○ The connection between workforce development and economic development with a geographic focus on San Diego and the Imperial Valley ○ Influencing financial capital to promote quality job creation. While the meeting took place in San Francisco, it included a range of statewide and national experts

	<ul style="list-style-type: none"> • Developed one-page convening summaries: Since the team planned to invite local participants that may be less familiar with Irvine and its work, the team developed convening “one-pagers” that included background on the Irvine Foundation and the initiative design process, draft objectives and a high-level design, and the types of questions Irvine wanted to explore • Tested grantee interest: Before committing to these topics, the team used the one-pagers to test grantee interest. Monitor Institute had short exploratory conversations with 2-3 local grantees with topical expertise to ensure that the topic was worth discussing, solicit feedback on the questions participants might explore together, and get input on people to invite. For all four topics, these initial conversations confirmed each topic’s relevance and shaped both the initial contours of the meetings and the questions to ask during additional interviews. • Sent invites and interviewed all participants: Like the Cavallo Point convening, Monitor Institute interviewed all participants in advance, providing them with context on Irvine’s work and soliciting their input on the topic • Created pre-read documents: Based on interviews and supplemental desk research, the team created detailed pre-reads that provided participants with a common baseline understanding of the issue and played back the ideas and potential solutions that participants shared. These pre-reads also provided framing for the discussions, so that we could maximize our short time together. • Facilitated the convenings: After framing remarks by a Senior Program Officer from Irvine, Monitor Institute facilitated the approximately four-hour convening. The agenda for each shared the same broad structure: <ul style="list-style-type: none"> ○ Act I – Understand: During this part of the meeting, participants got to know each other during an introductory exercise, discussed the content of the pre-read, and shared their overall reflections ○ Act II – Ideate: During this act, participants first developed a list of potential solutions to discuss in small groups, ensuring that the full range of ideas was considered while also reducing the chance for disruption because someone’s idea was prematurely “off the table.” Second, the group prioritized which of the solutions they wanted to develop further, either by dot-voting or simply forming groups around popular ideas. Third, these small groups worked fleshing out their desired solution ○ Act III – Share: During the final part of the meeting, participants shared their solutions and Monitor Institute facilitated a plenary discussion • Created detailed convening syntheses: For each topical convening, the CRLWW team created a synthesis document that expanded on the pre-read document—maintaining the original content and research while also adding important details about the solutions discussed at the meeting. The team then shared these syntheses with participants, along with a small gift, as a thank-you for contributing to the discussion
<p>What Worked Well</p>	<ul style="list-style-type: none"> • Use of shorter, targeted convenings in regional locations to more deeply understand topics: <ul style="list-style-type: none"> ○ Following the Cavallo Point convening, which was broad and touched on many topics, these targeted convenings were effective ways for Irvine and participants to explore topics more deeply ○ Three to four hours seemed to be an appropriate amount of time, since the convenings were more narrowly defined, the pre-reads provided a common baseline of knowledge, and the intent was not to drive the group toward consensus

	<ul style="list-style-type: none"> ○ By hosting these convenings in locations across the state, including one in a priority region, Irvine could reinforce its message that it was committed to understanding the regional variations across the state (and not just focusing on the more populous coastal areas) ● Expansion of the invite list beyond grantees: While Irvine’s pilot phase grantees served as local “co-hosts” for the events and helped shape the topic and agenda, it was helpful to invite others working in the space to provide additional perspective ● Acknowledgement in pre-read of the range of perspectives on a topic: For many of the topics, there were a range of definitions and perspectives that the team needed to manage (e.g. how to define what a “quality job” is, how to define “learn-and-earn”). Rather than striving to achieve consensus on these contested points, the pre-read documents acknowledged a range of possible definitions and then provided an appropriate definition or frame for the convening ● Comprehensive convening syntheses: Each synthesis document served as a helpful, comprehensive resource that included baseline research, the input from interviews that provided important nuance on the topic, and the invaluable input from field leaders during the convening on shape and nature of potential solutions
<p>Points of Tension</p>	<ul style="list-style-type: none"> ● Logistics and finding high-quality physical space: When hosting convenings outside of Irvine’s main offices in San Francisco, logistics became a challenge. Finding space in Fresno, Los Angeles, and San Diego was time consuming, as was coordinating catering and travel in unfamiliar locations. In addition, choosing a location in Los Angeles that was also convenient for those traveling from the Inland Empire was difficult. Nonetheless, hosting these in different parts of the state was valuable to the CRLWW team despite the extra effort ● Condensed timing and workload management: Conducting these convenings so closely together represented a significant challenge in terms of workload. While the team ensured efficiency gains by working with Monitor Institute on all four convenings in a relatively condensed timeframe (late June, mid-July, early August, and early November), having back-to-back convenings added pressure to POs’ relationship management efforts and to administrative staff’s planning efforts. ● Managing invite lists: In some cases, invitees forwarded their invitations to others in their organization or to peers in other organizations, likely because people assumed the event was an open conference. In the future, we should be clear that invitations are personal and not transferable ● San Diego’s overly broad topic: Most topics were at the right scope—tight enough to allow for focused discussion while broad enough to allow for grantees to explore a range of creative ideas. However, for the convening in San Diego, the topic of “the intersection between economic and workforce development” was likely too broad for the group to identify targeted solutions. In this case, the conversation landed on key initiatives currently being implemented across the region, like intentional utilization of libraries as “one stop shops” for workforce development initiatives, including the Library NEXt (Network of Education x Training) program that the City of San Diego library does in collaboration with UC San Diego Extension and Sally Ride Science

2.5) Setting the Stage for Future Grantee Engagement (December 2017 to January 2018)

Following these convenings, the CRLWW team incorporated the learnings into the initiative plan, which was approved in December of 2017. Moreover, this grantee engagement process also set up additional opportunities for engagement and impact in early 2018.

Timing	<ul style="list-style-type: none"> December 2017 to January 2018
Objective(s)	<ul style="list-style-type: none"> Look across a full range of grantee input and further document actionable ideas that the team could explore alongside grantees
What We Did	<ul style="list-style-type: none"> Developed a list of “big ideas”: With the wealth of information produced over the previous year, it became clear that a “synthesis of the syntheses” would be valuable to capture the range of input in one place <ul style="list-style-type: none"> Monitor Institute reviewed convening syntheses, interview notes, and other materials to identify ~20 “big ideas” that were shared across the all convenings, and the actions that could be taken to work on these ideas These ideas related to a range of direct service improvements, efficiency gains, policy changes, research questions, and communication strategies that participants shared Fielded a survey with the initiative’s core grantees: To test the relative interest and connections among these ideas, the team fielded a survey with core grantees and select experts to capture additional input Wrote a blog post sharing the ideas: Based on that input, the team is planning to create a public-facing blog post that shares the ideas as well as their relative attractiveness
What Worked Well	<ul style="list-style-type: none"> Identification of potential supportive areas of funding: During this stage, Irvine was finalizing the design of its initiatives. One key element of this design was that Irvine would support the work of “core grantees” and work closely with these grantees to identify supportive areas of funding. Many of the ideas documented fit well as potential supportive areas of funding, giving the Board a sense of what these areas could look like and giving the team a jumpstart on which areas to pursue Grantee survey: By surveying grantees, the CRLWW team had an opportunity to identify areas of mutual interest and test out another method for engaging with grantees
Points of Tension	<ul style="list-style-type: none"> Identifying survey participants: While there was agreement that the team wanted to survey grantees that would be part of the new initiative, the team also wanted to get additional perspectives from select pilot phase grantees (who were not selected as grantees for the initiative) and additional field experts. It took time and careful thought to identify the right set of participants Balancing what should be shared internally vs. externally: Condensing learnings while working to launch the initiative required an analysis on two levels: what would be shared internally and as well as what could be shared publicly and with grantees