



UNCG Strategic Directions Plan Implementation - Progress Report (July 2018 to Sept 2019)

Introduction

The Steering Committee is pleased to present this set of updates and progress reports on the activities undertaken by the Network between July 2018 and September 2019 in implementing the **10-Year UNCG Strategic Directions Plan (2018-2028)**. The plan was adopted by the UNCG membership at the June 2018 annual business meeting in Portland, OR. The plan is [here](https://www.kitchentable.org/sites/default/files/documents/uncg_strategicdirections.pdf) (https://www.kitchentable.org/sites/default/files/documents/uncg_strategicdirections.pdf).

Over the past 15 months the Organizational Strategies Teams and Strategic Area Committees (Scholarship/ Research, Teaching/Training, Practice/ Engagement) have been moving forward on a variety of strategies to strengthen recruitment and engagement of Network members and advance the collaborative governance field. The names of committee and team members who have been involved are listed in the relevant sections of this Progress Report.

Overall, we have made meaningful progress in almost all of the designated areas of the Strategic Plan, although the significant amount of work, committees and strategies involved has proven to be challenging. Since the Strategic Directions Plan is a living document intended to be adjusted as needed, the Steering Committee will be assessing accomplishments, lessons learned and potential modifications to the implementation structures and timelines and will present these along with the Progress Report at the Annual Business Meeting of the full Network in October.

As this Strategic Plan implementation work continues into 2020 and beyond, we encourage all Network members to actively engaged in the initiatives where you have a passion and can contribute your energy and expertise.

Respectfully submitted,
Susan Jeghelian
UNCG Steering Committee Chair
September 2019

Organizational Sustainability Strategies Progress Report

Organizational Strategies

Lead: Susan Jeghelian, UMB, UNCG Steering Committee Chair

Team: Steering Committee

The Steering Committee was tasked with overseeing overall Strategic Plan implementation as well as implementation of Organizational Sustainability Strategies. To accomplish this work, the Steering Committee set a bi-monthly schedule of meetings instead of its usual practice of quarterly meetings.

Building on the interest survey administered at the June 2018 annual meeting, in July and August the Steering Committee formed the Scholarship/Research, Teaching/Training, and Practice/Engagement Strategic Area Committees and Teams for the Membership, Partnership, Communications, and Fundraising Organizational Strategies and appointed designated member center leads and liaisons. Once the Strategic Area Committees were formed, in August 2018 the Steering Committee issued charges to the Strategic Area Committees covering implementation priorities and expectations around developing work plans, holding meetings and submitting updates and progress reports.

Committee work plans were initially submitted by the Strategic Area Committees in November 2018 and were finalized around January 2019. Thereafter, Strategic Area Committees and Organizational Strategies teams provided periodic updates on their progress at Steering Committee meetings. From Spring 2019 to Fall 2019, members of these Strategic Area Committees and Organizational Sustainability Teams also engaged in program planning for the October 2019 UNCG Annual Meeting/Conference at Indiana University as directed in the Strategic Directions Plan.

Fundraising Strategies

Lead: Peter Harkema, PSU, UNCG Treasurer

Team: Terry Amsler, IU and Roslyn Owen, PSU/KTD

The Fundraising Team worked with a graduate intern from PSU and compiled a list of funders along with their priorities, which will be a helpful tool as UNCG determines next steps. This list is available [here \(https://docs.google.com/spreadsheets/d/1Q7ihiQskn3-nkww5ELMFnkO8PFN2UBdYUnafIU14C8M/edit?usp=sharing\)](https://docs.google.com/spreadsheets/d/1Q7ihiQskn3-nkww5ELMFnkO8PFN2UBdYUnafIU14C8M/edit?usp=sharing).

Rather than develop a full "funding plan" this past year the Team both compiled the list and requested that the Strategic Area Committees' work to clarify whether they had activities that would require funding with the intention that the subcommittee work will inform the "what" UNCG would be seeking funding for (of course there may be additional priorities that fall outside these areas that specific areas e.g. support for the network as a whole). The purpose of the stepwise approach was to ensure that the funding plan and associated activities is geared directly to the work that members will be undertaking.

In addition, the Fundraising Team has requested that the SC (with member input) have a conversation about messaging and clarifying the Network's "value proposition." There was considerable discussion about this at our last annual meeting, but the Team thinks it would be helpful to set aside dedicated time after the October Conference to discuss this further. By way of example, the PSU intern, Caroline Mellor, who assisted the Team with the [funder list](#), found that no funders use or were familiar with the terminology "collaborative governance." Thus, the question for the group to consider is "how does UNCG remain true to its mission/identity but also translate its work and opportunities in language that funders will understand and respond to?" It is worth noting that this is both a messaging question but also a story telling question and the case studies that the Practice/Engagement Strategic Area Committee is pulling together should be very helpful. This step will help the Network to be poised to move for strategically forward with a funding plan.

The Teaching/Training Committee and Steering Committee have talked about the need for helping others to "get" this work, and the need to perhaps lay the foundation for fundraising by first launching information sessions or participating in summits or roundtables, where the goal would be to explain or advocate for the collaborative governance field. While this may not be an immediate payoff, it could be longer term.

Membership Strategies

Lead: John Stephens, UNC, UNCG Membership Chair
Team: Marina Piscalish and Molly Stenovec, WSU/UW

The Membership Committee led the discussion of several key issues underlying their strategies with the Steering Committee. The Membership Committee's approach for creating lists of centers/individuals for UNCG recruitment is a relational one that recommends UNCG members reach out to people they know or would like to get to know. Membership wants to create tools to help with these conversations and sales pitches and may suggest outreach be based on similarity of centers. To ensure there is no dilution of the Network's center-focus, criteria will be developed to target individuals affiliated with universities whose work integrates research, theory and practice. Criteria for selecting centers will be developed and will also provide guidance on how to know when the membership is not working out.

Concerns were raised about other organizations drawing on the same recruitment targets and being mindful that there are different kinds of university centers that UNCG has not seen as part of our Network (e.g., centers doing civic action work). UNCG may now want to consider areas being addressed by university centers that relate to a broader view of collaborative governance and figure out how the Network would add value to them. Membership wants UNCG to be able to reinforce what differentiates us, what is our brand and tie this into our mission and vision for collaborative governance. It was noted in these discussions that even when outreach efforts do not produce new center and individual members, it could produce partner relationships for sharing resources, skills, or expertise.

Membership wants to interview new members after the first year and gather biographical information to use as part of recruitment -- a "high touch" approach with follow-up and real work. Additionally, the Committee wants to follow-up with veteran members on how UNCG has helped them with CG work, i.e., how they are leveraging UNCG internally and externally and engaging students, which may be a cross-over with the promotional work that the P/E Committee is doing.

Incentivizing recruitment by forgiving dues and having the alternative of putting the recruiting center's dues into a separate fund to support strategic outreach were both options that were discussed. The need was recognized to have some UNCG foundational documents for members to use in outreach and a working definition of CG; a starting point for this could be the statements at beginning of UNCG Strategic Plan. Membership suggests set of questions when recruiting, including asking potential new members not just what they do but why they do it. Another cross-over area could be the Membership criteria used for recruiting could be relevant to the criteria being developed by the Partnership Team for selecting partners.

The strategic initiative to directly engage all UNCG members in identifying and recruiting new centers to enhance the work of the Membership Committee was suspended due to KTD reduced staff capacity during relevant periods but will be revisited in the coming year. The Committee outlined questions for surveying existing individual members and Centers joining in the previous two years to better understand the value they see in membership and is poised to go ahead with these surveys in coordination with other Committees in the coming year.

Partnership Strategies

Lead: Ashley Labosier, Pepperdine, UNCG Steering Committee Member
Team: Wendy Willis, PSU, and Palma Strand, Creighton

The Partnership Team has held off moving forward with the development of criteria for selection of UNCG partners because this necessitated involvement of the Strategic Area Committees, which over this past year have been involved in forming themselves, developing their work plans and launching their initiatives. In light of these necessary first steps, asking the three Committees to engage in discussions about criteria for potential partners was considered premature. The development of partnership criteria is expected to be taken up by the Partnership Team and the full Steering Committee in coordination with the Strategic Area Committees in the coming year.

Some of the Strategic Area Committees, however, have begun to consider potential partnerships. For example, the Teaching/Training Committee has included a question in the interviews it is doing with other members about who else in their area (university based or otherwise) is doing this work. The T/T group expects that this will uncover both some potential members and also other types of partners. The Committee has talked about trying to do a convening like the one the research group did last year around teaching/training, and noted that if this were to happen, they would want to invite people who were not necessarily Collaborative Governance people, but people who have experience in pedagogy or service learning. Next steps would be to identify specific partners in this area as the T/T Committee figures out how to make that type of convening work from a fiscal perspective.

Communication Strategies

Lead: Bob Jones, FSU, UNCG Steering Committee Member
Team: Susan Jeghelian, UMB, and Sarah Giles, PSU/KTD

Due to reduced KTD staff capacity (Sarah out on family leave), the Communications Team focused on holding quarterly webinars in order to give UNCG members a chance to network with each other, share ideas, and feature their work in an ongoing way. The Steering Committee is continuing to look at how we might address the proposed new officer position of

Communications chair and sub-committee as outlined in the strategic plan, given capacity and interest of members. In addition, the Practice/Engagement committee, headed by Chris Page, ended up taking on an effort to articulate how collaborative governance supports university mission-central community engagement and service learning and has been working on developing materials that communicate that.

The Communications Committee held three webinars over the past year. Our goal was quarterly, but again, KTD had reduced staff capacity to do so and one member who was interested had to postpone until next year. The three webinars addressed a variety of topics from organizational / institutional to practice to theory and included six different UNCG members as presenters and were well attended by other UNCG members (~10 attendees).

December 6, 2018: *“Doing Our Jobs / Saving Our Sanity: Defining Our Role, Responsibility and Risks Related to Serving Our University Communities”* Presented by UNCG individual member Lara Fowler of Pennsylvania State University, John Stephens of UNC Chapel Hill, and individual member Marina Piscalich of University of Hawaii

April 17, 2019: *“Service Learning for Collaboration Beyond the University”* (public engagement partnership with City and the City’s local Community College) Presented by Ashley (Trim) Labosier, Pepperdine University

September 11, 2019: *“Toward a new theory of collaboration (around 3 lenses of Interdependency, Trust and involved parties BATNAs)? An Invitation for early reactions”* Presented by Steve Greenwood, PSU

Practice/Engagement Strategic Area Committee Progress Report

Center Chair/Lead & Steering Committee Liaison:

- Chris Page, Ruckelshaus Center, UW/WSA

Committee Members:

- Kevin Harris, WSU/UW
- Bob Jones, FSU
- Terry Amsler, IU
- Paul Brown, UMD
- Vicki Reed, UT
- Marina Piscalich, UH

The Practice/Engagement Committee has met quarterly and worked in the interim to implement the UNCG Strategic Plan, initially focusing on the two-year implementation priorities:

1. Highlight how collaborative governance supports university mission-central community engagement and service learning as a membership recruitment strategy.

The Committee is pleased to have produced a pair of pdfs for UNCG member review:

[UNCG Role in Higher Education](#)

<https://drive.google.com/file/d/0B4k6KWVWLyfuOFdsb2lzdGlrcFdWMFA5SkdLQjFna1JVcFdR/view?usp=sharing>

[Collaborative Governance Works](https://drive.google.com/file/d/0B4k6KWVWLyfuS1JFSUFzR2tHZU1TekF0dS1ZYU9ROFVoVlBz/view?usp=sharing)

<https://drive.google.com/file/d/0B4k6KWVWLyfuS1JFSUFzR2tHZU1TekF0dS1ZYU9ROFVoVlBz/view?usp=sharing>

These materials are intended for distribution to various audiences such as university leaders, potential partner or funding organizations (for member centers or the Network), policymakers, prospective new UNCG members.

2. Identify multi-state, multi-center opportunity areas to facilitate funding proposals that blend collaborative governance practice, scholarship and/or teaching.

Potential multi-state, multi-center opportunities:

- One idea would be to adopt the model used on past multi-state collaborations, e.g.:
 - Agency for Healthcare & Research & Quality Citizens' Forums (2010) - (federal agency). UNCG centers in multiple states (Oregon, CA, MA, Nebraska) were sub-grantees w/Oregon Health & Sciences University leading this project. Our centers facilitated a series of patient focus groups in several states to solicit input from the broader public on health care priorities and value-based issues and to expand our understanding of effective methods for soliciting input from the public.
 - Eldercare Workforce effort (Centers from WA, MA, FL, CA)
- Large Landscape Collaboratives (e.g. Mississippi River, other rivers/watersheds such as Columbia, Susquehanna, Colorado), Glen Canyon Dam Adaptive Management Workgroup
- Climate Resiliency
- Issues spanning multiple states w/member centers: opioid epidemic or other public health challenges
- Per federal OMB request for info (July 2018) toward establishing a “Government Effectiveness Advanced Research Incubator” to modernize fed workforce & integrate private sector tools of data tracking & analytics (end goal: to have data better inform public policy and federal gov ops). OMB wants to spread across USA. UNCG members see if host universities want to spearhead public-private partnerships on this. Could work in any state with multiple federal agencies (e.g. regional offices of EPA, USFWS, DOI, Labor, Census, State, etc.) with universities (in partnership with private sector) providing research, technology, executive training.

Funders: The Committee’s thinking is that it is too early to ask for funding from foundations until the Steering Committee (or full membership) discusses this. UNCG might best engage initially in efforts to educate funders about collaborative governance (and democracy) before asking them for money. The Committee plans to introduce this topic for discussion during its session at the at the annual meeting at Indiana University in October 2019. Other thoughts:

- The W&F Hewlett Foundation has funded the Participatory Budgeting Project for their public involvement in budgeting work in communities throughout the US. That’s at least interesting in terms of potential UNCG interests matching up with Hewlett’s strategic funding interests.
- The Committee talked more about private foundation sources as opposed to government agencies (who are perhaps more typical academic funders).
- Also, the Committee recommends working through existing funder “champions” who have funded UNCG member projects in the past if we have such champions.

- Bloomberg Foundation (“We’re Still In” climate research/adaptation), Joyce Foundation, National Conference on Citizenship partners, Philanthropy NW (need UNCG members in AK, MT to pitch the idea), other regional funder networks, use interns for research.

Teaching Training Strategic Area Committee Progress Report

Center Chair/Lead:

- Laurel Singer, National Policy Consensus Center, PSU

Steering Committee Liaison:

- Ashley Trim, Pepperdine

Committee Members:

- Mary Lou Addor, NCS
- Jennifer Allen, PSU
- Frank Dukes, UVA
- Katherine Himes, UI
- Amanda Murphy, WSU/UW
- John Stephens, UNC
- Molly Stenovec, WSU/UW

The UNCG Teaching/Training Committee was formed approximately one year ago and has about 5-6 active members that have been meeting roughly every month (give or take). One of the first tasks accomplished by this committee last year was the creation of a two-year action plan, based on the UNCG strategic plan. The Committee unanimously wanted to set realistic goals for what it could accomplish that would provide meaningful benefit to members as well as be helpful in advancing the overall organization. Our committee has no plans to outreach to funders at this time. The two-year work plan set the following goals and objectives:

GOAL #1: Through its conferences and other peer-to-peer forums, UNCG will promote the sharing and improvement of teaching and training methods, and content for practitioners in collaborative governance.

- A. Create a UNCG Teaching/Training Committee to oversee the implementation of the goals and objectives work plan objectives and to coordinate with and provide input to other UNCG teams and committees.
- B. Develop a teaching and training panel for the UNCG 2019 conference.
- C. Use the UNCG collaborative governance competencies guide to align and produce a foundational curriculum outline for foundation and advanced level courses in collaborative governance.
- D. Provide UNCG members with online access to quality collaborative governance teaching materials, curriculum, syllabi, case studies, simulations, exercises, and videos by 2020

GOAL #2: In addition to growing the collaborative governance field, we will build the next generation of practitioners, trainers, and researchers in collaborative governance by nurturing and facilitating their growth and capacity as emerging leaders.

- A. Encourage UNCG members to share best practices in growing the next generation through sharing their mentorship and applied learning of emerging collaborative governance leaders, scholars, teachers and practitioners more purposefully and including this in the two-page descriptions of their centers (see Goal 3).

B. Encourage UNCG members to intentionally expand the diversity of the next generation of collaborative governance leaders, scholars, and teachers.

GOAL #3: Attract new partners to help UNCG grow its mission and membership, including the development of training and outreach in collaborative governance to a wider membership.

A. Encourage UNCG Members to inventory who is providing collaborative governance related training within colleges and universities in their state and encourage their participation in UNCG.

B. Explore mechanisms for capturing the range of member services such as training, courses, mentorships, training guides would serve to connect members to each other's work as well as serve as an outward facing promotion of and access to the practice of collaborative governance.

The following is a progress report on the committee's activities.

Creating a teaching training track at UNCG Conference: One of the key priorities for the committee is to develop a teaching and training panel for the UNCG 2019 conference. The committee submitted a proposal for three separate presentations that were combined into a panel presentation at the 2019 conference.

Creating a Repository for Teaching and Training Materials/Conducting a needs assessment: One of other key priorities for the committee was to explore the possibility of setting up a repository for teaching/training materials. Moving this and other work of the committee forward requires a general understanding of the overall status of teaching, training and mentorship activities among centers and related programs. Members populated information on their own centers and are in the process of conducting phone interviews of the directors of approximately 11 centers around the country to gather the following data:

1. What academic courses do you currently offer related to collaborative governance?
2. What other training do you offer related to collaboration?
3. What mentorship or internship opportunities does your Center/Institute support?
4. What are some of the key challenges you face in providing these academic training, mentorship services?
5. What resources would you find most useful in helping you address your work in teaching training and mentorship i.e. Curriculum, case studies, modules, videos?
6. How would you want to access these materials?
7. What resources would be willing to share for others to use: Case studies, modules, videos
8. Who would they want to have access to the material you've shared?
9. What other universities or entities in your state provide training in this area?
10. What topics or areas of interest would you want to explore with others who are teaching, training, or mentoring in collaborative governance?

This information will also be useful in determining how much Centers may want to share whatever resources they have, what resources they would like to access and how, what are challenges they would want to see our committee help them address.

Collaborative Governance curriculum development: Michael Kern has recently completed a yearlong sabbatical where he has been conducting an extensive search of collaborative governance and related topics. Our committee has been in contact with Michael to consider how to use his findings to address whether and how to align recommended curriculum with the UNCG Collaborative Competencies guide.

Scholarship/Research Strategic Area Committee Progress Report

Center Chair/Lead:

- Steve Smutko, Ruckelshaus Institute, University of Wyoming

Steering Committee Liaison:

- Danya Rumore, UU

Committee Members:

- Lisa Amsler, IU
- Jennifer Allen, PSU
- Kirk Emerson, UA
- Michael Kern, WSU/UW
- Tina Nabatchi, SU
- Daniel Schugurensky, ASU
- Mads Palihapitiya, UM
- Wendy Willis, PSU
- Palma Strand, Creighton
- Rebecca McLain, PSU

The Research and Scholarship committee met twice via conference call. In the first meeting, the Committee reviewed and agreed on the strategic actions that the committee was to accomplish. The activities listed in the workplan were:

1. Develop programming input to UNCG conference planning committees
2. Create and curate a database of UNCG members' current and completed collaborative governance scholarship
3. Create an annotated collaborative governance bibliography for UNCG's website
4. Create and post on UNCG's website an inventory of academic CG programs.
5. Develop a research agenda.

The Committee agreed that action item #4, create an inventory of academic CG programs, is not relevant to its mission and purpose. The committee requested that the UNCG Steering Committee assign this role to the Organizational Committee.

The Committee proposed a session on research and scholarship for the 2019 UNCG meeting in Indiana. Steve Smutko agreed to participate on the conference planning committee to achieve this action item. The session will provide an update on research and scholarship activities (e.g., the 2018 research and scholarship retreat in Wyoming) and host a facilitated discussion on areas of research and scholarship that are most needed and relevant to the UNCG membership. Information from this discussion will be used to develop a research agenda or roadmap.

The committee has created a draft bibliography of "essential collaborative governance scholarship." The bibliography has yet to be categorized. Once that is done it will be circulated to the UNCG membership for review and additions. Look for that later in the coming year.

The committee also discussed best approaches to creating and maintaining a database of UNCG members' scholarship and has yet to decide on the best approach to this. One option is to include a link to all members' CVs on the UNCG website. Another is to create a stand-alone document of member publications that can be updated periodically. Stay tuned for further updates on this strategic action.