



Regional Convening Planning Guide

For RPIC Lead Organizations



Regional T/TA Initiative Convening

PLANNING GUIDE

for RPIC Lead Organizations

2021 - 2022

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INTRODUCTION

Thank you for all your work this past year in gathering the Community Action Initiatives from across your region!

It is now time to bring people together within your region around these innovative initiatives to connect, learn, collaborate, and identify opportunities for replication, as well as capacity building.

The convenings are designed to highlight the initiatives within the region and promote capacity building. They can be held in 2021 to promote innovation and capacity building region-wide or could be thought of as a "capstone" event to occur later in FY2022 to celebrate regional innovation and progress made in strengthening the network.

As you begin to plan for the convening, the COE team invites you to review this guide to assist in preparations. **This guide is intended to be adapted to your needs as a unique region.** It should give you an overview of some potential basic meeting structures, options, tools, resources, and considerations for planning the regional convenings described in the original HCCT cooperative agreements. None of the content within this planning guide is required to use – other formats, tools, and ideas are welcomed. We simply hope this helps as a starting point or for additional ideas as needed.

The COE team is available to provide additional support through brainstorming or review of the convening plans, as well as virtual or on-site attendance at your convening. You may contact any of us for support during the convening planning process.

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We look forward to learning with you and supporting your work!



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About the Regional Convenings

As a part of the Human Capacity & Community Transformation grant, a key deliverable is for the COE to support RPIC-led Regional Convenings that highlight community activities, strategies, partnerships, and best practice models. These convenings can be held virtually or in-person. Regional Convenings are to be consistent with the CSBG Performance Management framework and may include models such as collective impact, the whole family approach or others.

The Regional Convenings have a few common goals across all regions, and are also tied to the State T/TA Plans drafted in early FY2021. The common goals are below; each RPIC should also consider region-specific goals regarding what the convenings can accomplish for them.

- Identify practices, activities, and services that maximize CSBG funding at all levels;
- Share promising initiatives and lessons learned across regional networks;
- Coordinate innovative, effective, and sound T/TA efforts to ensure accountability and sustainability across the CSBG Network; and
- Facilitate and implement regular information-sharing, messaging, and collaborative efforts throughout the CSBG Network.

What are your RPIC specific goals?

These can be developed through the planning committee, led by the RPIC lead organization, prior to the agenda being created. The following prompts can lead the development of region-specific goals to guide the process and content of the convening.

- How would you like things to be going in your region and/or state a year from now?
- What would you like to accomplish as a result of this convening?
- What is your purpose in holding the Regional Convening?

Goals for the Regional Convening should be:

- “SMART” (specific, measurable, achievable, relevant, time specific)
- Aligned with regional/local T/TA needs and addressing present issues
- Indicative of a desired change in participants (e.g. increased knowledge of certain practices)
- Easy to communicate and applicable across the region

The RPIC may have one main goal or a few. Make sure all goals are clear and easily addressed through the agenda items of the convening.

The following sections provide additional considerations for the RPIC lead and the planning committee as the logistics and agenda is determined.

Regional Convening Considerations

When is the Convening Held?

As early as April 2021, no later than September 2022

Who Attends the Convening?

Possible attendees:

- RPIC Lead Organization
- State Associations (teams relevant to the HCCT Grant)
- State CSBG Office Staff
- Local CAA Members from COE Steering Committee in the region
- Highlighted Initiative CAA Staff
- CAA staff from across the region, as space permits

Where is the Convening Held?

Virtually: Zoom, WebEx, or other meeting platform that the RPIC may have access to. If held virtually, here is a [guide](#) with some helpful tips.

If no access to an online meeting platform, contact the COE for support.

In-Person: Member Institution or local hotel

Location: Space near hotels, restaurants, and other amenities for out-of-town guests

Site: 1 large meeting room, 6 smaller breakout rooms, and informal social/meeting spaces; registration table area; reception site on or off site.

What Format/Schedule to Consider?

One full day with lunch break and morning & afternoon break

Two half days (afternoon & the next morning)

Day and a half (6 hours on day one & morning of day 2)

The option the RPIC chooses will depend on content, speakers, needs of the group, and whether the convening is held virtually or in-person. Facilitation and presentation options to consider are listed later in the document. In addition to the above logistical considerations, the RPIC may consider a few questions as they develop the agenda and plan:

1. What are the top T/TA needs across the region that can be addressed or strategized through the Regional Convening?
2. What innovative practice models does the region as a whole want to learn more about (i.e. collective impact or whole family approach)?
3. What are the topic areas of the Highlighted Initiatives (i.e. housing, food security, etc)?
4. Are there partner organizations that may be common across states? (RPIC may consider inviting for a portion of the event)

Materials

- Regional T/TA Need Summary
- Overview of Initiatives within the Region
- Agenda (adaptable option in appendix)
- Planning template for any next steps (adaptable option in appendix)
- Other handouts/resources RPIC lead and/or planning committee deems appropriate

Facilitation & Presentation Options

A good mix of full group and small group exchanges are often ideal depending on the audience and goals of the convening.

- [Ignite Sessions](#)
- [Pecha kuccha](#)
- [Campfire discussion](#)
- ([Virtual](#)) Poster session
- [World Café](#)
- Roundtables
- [Fishbowl](#)
- Informal Networking Sessions
- Innovative Initiative Panel Discussion
- Small group break-outs

A few other possible discussion protocols can be found [here](#). Feel free to adapt methods to the needs of your convening, these are simply ideas.

Space

Different types of sessions require different types of spaces. Below is an overview of the space options to consider if the convening is held in person.

1. **Large meeting space:** a large primary meeting space for all participants to assemble at round tables, with presenter space at the head of the room.
2. **Breakout space:** a series of smaller “breakout rooms” for workshop sessions or initiative presentations; ideally with flexible space.
3. **Informal areas:** meeting spaces in which participants can meet for coffee and discussion.
4. **Reception space:** for a reception for networking, which could include poster sessions.
5. **Board meeting space:** this could be used for a smaller group to meet during part of the convening, if a portion of the convening is for primary stakeholders and a portion is for a larger audience.

Roles & Audience

Ultimately, the goals of the convening should guide the roles of different stakeholders and the target audience for the Convening. Planning should be led by the RPIC, working collaboratively with the COE and key regional stakeholders (State Associations and State CSBG Offices) to draft the agenda (option provided in appendix) and identify the audience. Depending on the goals of the Regional Convening, there may also be local CAA leaders/staff and COE Steering Committee or CSBG Working Group members that would be appropriate to invite as well.

The COE is available to support the planning of these Regional Convenings. As RPICs progress in their planning of these convenings, they are encouraged to communicate with one another and with the COE to optimize the sharing of common convening goals and best practices.

APPENDIX

SAMPLE Agenda

*One-day format option (please note – this is not required – use if you wish, steal ideas, or create your own)
This can also be adapted to two half days or a day and a half, depending on the needs of the RPIC.*

9:00 AM	Welcome & Introductions
9:30 AM	Overview of Regional T/TA Needs & Highlighted Initiatives <ul style="list-style-type: none">• <i>COE could provide a welcome and overview of the hub of initiatives.</i>
10:15 AM	Ignite Presentations of Highlighted Initiatives <ul style="list-style-type: none">• <i>In-person option – Ignites, then meet & greets at tables to discuss and answer questions (almost like exhibit booths)</i>• <i>If virtual, Ignites, Chat/Q&A or allow people to go in and out of break-outs</i>
11:45 AM	Full group discussion of innovations and aspects for broader adaptation
12:15 PM	Break – Lunch <i>(if many Highlighted Initiatives, continue Ignite Presentations after lunch)</i>
12:45 PM	Community Partner Presentation(s) – Stakeholder Engagement Discussions <ul style="list-style-type: none">• <i>See above facilitation options on page</i>
1:45 PM	Break
2:00 PM	Addressing State/Regional T/TA Needs to ensure capacity to do the work and replicate <ul style="list-style-type: none">• <i>COE could provide facilitation and/or offer resources related to top needs for the region</i>• <i>COE could provide an overview of the Organizational Self-Assessment Tool</i>• <i>Discussion amongst the region will be important here</i>
3:00 PM	Q&A and Outline Next Steps
3:30 PM	Adjourn

Planning Worksheet

This is optional and can be used to chart out any next steps post-convening to address T/TA needs or support adaptation of initiatives across agencies.

Goal:		Outcome:		
Strategy:				
Action Steps (WHAT)	Timeline/Due Date (WHEN)	Org/Staff Responsible (WHO)	Resources (Financial, Facility, Human)	Measurement of Success

(an option for a planning tool to be used for any next steps related to the Regional Convening - adapt or choose to use as your region sees fit)