

October 13, 2014

MEMORANDUM

TO: Audrey Betcher

FROM: Andrew Willis

RE: How we could work together in Rochester

Thank you for your continued interest in working with The Harwood Institute. As a follow up to our previous conversation, the following memo provides an overview of our Public Innovators Lab, our foundational training experience, and a proposal for bringing a Lab and potential additional support to Rochester.

This proposal is built on the understanding from our discussion that you are interested in leveraging the Lab and The Harwood Institute's approach to change as a way to build a common framework for partner organizations in Rochester and spur more collective action among key organizations in the community.

Lab Overview

The Harwood Public Innovators Lab is a 3-day immersion in the Institute's core approach to change. Participants learn how they can use our frameworks to start changing the way they and their organizations or community teams are doing their work so that their efforts become more effectively rooted in the context of their communities. We call this turning outward – having an orientation such that you use the community, not the conference room, as your reference point for the day-to-day and strategic decisions you make. The Lab helps you better understand the extent to which you are turned outward toward the community in your work and how you can accelerate your efforts.

The content of the Lab is an orienting experience to get public innovators on the path toward being able to:

- 1) Engage their community beyond the usual suspects to understand people's shared aspirations.
- 2) Shift their relationship with the community through engagement – so that they aren't simply seen as a customer service provider but are building will for people and groups to act together as partners.
- 3) Create or modify their strategies so they are aligned with your community's capacity for change efforts – what we call a community's "rhythms" or Stage of Community Life.
- 4) Assess the conditions that enable change in communities – what we call public capital – and learn how to build strategies to achieve your mission and create these conditions at the same time.

The Lab is designed for participants to use the frameworks and tools to think through their

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current challenges. It includes both small group and large group sessions. Participants will leave the Lab with a better understanding of what it takes to create deep change and some beginning steps they can take to accelerate their community work.

Bringing a Lab to Rochester

We propose conducting an Innovators Lab in Rochester for up to 100 individuals. The Institute would be responsible for:

- Conducting the training - a Lab for 100 people requires at least three Harwood certified coaches and a lead coach
- Providing all content and Lab materials
- Providing license for participants to use all content and tools with their staffs and community partners (for non-commercial purposes)

- Providing any needed advice and counsel on potential participants, setting up event space and other issues that may arise
- Coordinate any and all messaging and communications around the Lab with our partners on the ground

Our on the ground partners would be responsible for:

- Providing a site with a large enough room for 100 people and two smaller breakout rooms – the plenary space should be equipped for A/V
- Covering costs of meeting space and at a minimum breakfast for participants (participants could pay for their own lunch and dinner if options are available)
- Supplying flipcharts, markers and other basic meeting supplies
- Printing of Lab materials and providing Lab binders for participants
- Selecting and recruiting participants and providing a contact list

Timeline

We will work with you on a time that mutually works best for us and your community partners. Depending on your ability to generate interest and fill seats, from the signing of an agreement these Labs can be hosted as early as 2-3 months from the time of signing. We can also work with you on a longer time frame if necessary.

Additional Components

Our experience is that, while the Lab itself can serve as a powerful reorienting experience for participants, ongoing coaching and additional support is often needed for the Harwood approach to take root and spread and for individuals to learn ways to apply it to their challenges. We would



welcome the opportunity to explore additional support for participants (these supports are currently being used as part of initiatives in a number of locations):

1. Learn and Apply Webinars – We would offer six of these over 18 months, focused on key areas of the Harwood approach that would help leaders understand and theme what they are learning from community conversations, share it strategically with the neighborhood residents, and apply it to the strategies and approaches that they are pursuing or considering pursuing.

2. Monthly coaching – We would provide certified Harwood coaches to work with Lab attendees in groups of up to 25 to help them continually apply the Institute’s frameworks and tools as they are engaging their communities and then seeking to apply the learning to work on the ground.

We could also certify local Harwood Coaches in your network to allow for distributed capacity in Rochester in a cost-effective way that increase your ability to create deep, system-wide change over time.

3. Innovation Spaces – typically, over a period of 18-24 months when working with a community coalition, we insert in-person “innovation spaces” every 4-6 months. These are important spaces we guide that are focused around generating joint learning to accelerate the work on the ground.

4. Design and Strategy – the Institute often conducts a series of these design sessions to help organizations or groups of organizations answer critical strategic questions related to scaling this work. We could envision working with the place-based funders group to host 2-3 of these sessions to craft a full strategy for spreading the turning outward approach beyond an initial cohort of leaders.

Investment

We can adjust the number of people we would train from your area based on your need. The Harwood Institute's fee for conducting the Public Innovators Lab is roughly \$1,000 per person plus travel and related expenses for a Harwood staff support person, and 3-4 Harwood coaches.

We can estimate and roll those costs into a contract if that is preferable. Estimated costs for the additional components would be in the range of \$50,000-\$250,000 over 18-24 months.

