Enterprise Community Partners

Transcript of Webinar

2023 ConnectHomeUSA

Toolkit, Part 1

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Olivia Painchaud: Hello everyone, and welcome to the ConnectHomeUSA Toolkit webinar Part 1. My name is Olivia Painchaud, and this webinar was prerecorded. However, we will receive and respond to any questions sent to the email shown on the screen and listed in the video's description. That email is connecthome@hud.gov.

This webinar is part one of a two-part series. The purpose of the series is to walk you through how to use the toolkits we've developed as a supplement to the ConnectHomeUSA playbook. A little background for those of you who may need it.

The ConnectHomeUSA playbook is a guide that explains the components necessary to establish a successful digital inclusion program. The toolkits we are talking about today allow you to operationalize the first five chapters of the playbook, which are dedicated to helping you launch your digital inclusion program.

Today's webinar will cover the launchpad toolkit, the convening toolkit, the action plan toolkit, the partnership building toolkit, and the fundraising strategies toolkit.

For communities new to the ConnectHomeUSA program, these first five toolkits help you assess your community's resources and needs, help you identify partners and funders, create an effective implementation, or action plan and help you execute that plan. The toolkits provide checklists, templates, timelines, and additional resources you can consult for further information.

For those communities that have already begun implementing digital inclusion initiatives, these tool kits are new resources that will make you work easier and not harder. We encourage you to check them out, download the templates that you find useful and edit them to make them your own.

As we go through the first five toolkits today, we will look at a few of the resources included. We encourage you to look through all of the tool kits and download the templates for your use. The toolkits can be found at the link included on the slide.

The first tool kit we are going to discuss today is the Launchpad toolkit. Again, for communities new to the world of digital inclusion, we recommend starting with the launchpad toolkit. This toolkit covers chapters one through five of the ConnectHomeUSA playbook. We do recommend reading those chapters to get a good understanding of the important first steps you should undertake and then turn to this toolkit to operationalize that information. What you'll find in this toolkit is the launchpad checklist and the core planning team mapping worksheet.

Let's talk about what you will find in that checklist. The checklist includes an overview of key digital inclusion concepts guidance for building your core planning team, which is the group of people who will help you put the digital inclusion program together, tips and resources for understanding your community's assets and needs, including how to create a baseline survey. A baseline survey is important to help you understand what your residents need, and these results will help you put together a program that is responsive to those identified needs. The checklist also includes a sample baseline survey that HUD used, which you can adapt for your own use. Up here, we have a link to the tool kit, and right below we have a link to the ConnectHomeUSA landing page. I'm going to take us to the landing page and here you can see all of the toolkits included within the ConnectHomeUSA guides.

Right here, the launch pad toolkit is where we are beginning, and as you can see, we have the launchpad toolkit checklist, the core planning team mapping worksheet as a PDF, and the core planning team mapping worksheet as a word document.

Here's the launchpad toolkit checklist. As I scroll through, you can see how there are a few different sections that help organize your core planning team and introduce you to a digital inclusion initiative.

On the next slides, we'll show you what the core planning team mapping worksheet looks like. The checklist and the core planning team mapping worksheet can help you identify the organizations and individuals central to your digital inclusion efforts. As we mentioned, the checklist offers guidance on how to assemble a core planning team, while the worksheet provides a visual and additional recommendations on the types of organizations that could be included as a part of your core planning team. And remember, when you're first starting out, your core planning team can be small.

A few questions to consider when assembling a core planning team include, 'Who from your organization should be involved?' and 'Which external organizations would be valuable members of your core planning team?' In addition to deciding on your core team, it is important to identify which area of the digital inclusion stool your core planning team will focus on first. Where is there the most need? And is it helping residents access devices? Or alternatively, what might be the lowest hanging fruit? Maybe you want to focus on easy ones at first and progress further in your digital initiative. And finally, what resources does your team have available to address the areas you want to focus on?

On the screen in front of you, we have an image of the core planning team mapping worksheet. This worksheet provides a chart that allows you to go through possible members and track who you've identified. The worksheet includes potential partners and organizations that can help guide your efforts to build a diverse team with varied skill sets. It's important to note that not every organization listed on this worksheet needs to be included in the core planning team. This is offered as a resource to help identify possible members and organizations. Remember that you can download this sheet and edit it to fit your team's needs.

Additionally, the worksheet highlights the importance of selecting a team member or an organization to lead the core planning team. Having one individual or group to organize and keep the team on track is essential to the success of your digital inclusion initiative. We call this organization or individual the quarterback.

Here we see the core planning team mapping worksheet with some individuals and organizations identified. When first starting out, you do not have to have a large planning team. In some ways it may even be better to start small. Think about who from your organization would be good to include.

For example, having someone from your organization's leadership who can help you convey the importance of this work to other parts of your organization is a good idea. Who could this person be? Maybe the executive director, or the director of IT. Who else from your organization could be included? Someone from resident services could be helpful, or if you're going to focus your efforts on youth, a staff member who is involved in programing for this population is a great idea.

In terms of outside organizations, is there an organization that you've been working with closely already that could be a good ally or resource? Maybe it's your library. Libraries are typically very involved in the work of digital inclusion.

Once your initial core planning team is in place, you should begin assessing your community's needs. We'll talk about this on the next slide. We do want to spend some time discussing the baseline survey, since it's an important component of building a digital inclusion program that responds to your community's needs.

To understand the digital landscape of your community, the playbook and toolkit recommend assessing it through the lens of the three-legged stool. This means identifying what resident's needs and assets already exist, with respect to connectivity devices and digital literacy training. The baseline survey can be used to collect this information. The baseline survey is an important component to ensure your digital inclusive initiative meets the needs of your community. There are five steps in the toolkit that will help you draft a survey that gathers the necessary data for your initiative to be successful.

The first step is identifying the population and key metrics you want to measure. Important questions to ask when identifying a population are, 'Who will you focus your connectivity efforts on? Which metrics are most important to track for your community or your program, and what data already exists?'

The second step is to select the survey sample. If your community population is too large for the survey to include all residents, you will need to select a sample to survey that is representative of your entire community. When selecting a survey sample, ensure that all groups, household sizes and perspectives that exist within your community are represented.

The third step is to design the survey. It is recommended to design a survey that is short and easy to understand for all population groups you'll be surveying. For words or phrases that may not be common knowledge, include definitions to ensure the survey questions are as effective as possible.

The fourth step is to conduct the survey, and the last step is to analyze and share your results. On the screen in front of you is a sample survey that you and your core planning team may customize to fit your community. As you can see, the sample survey addresses these important points in a very simple way. The questions are short, the language is easy to understand, and the questions are precise.

Next, we will speak about the convening toolkit. One of the first things we ask communities to do is to plan and hold a local convening. This is discussed in greater detail in playbook chapter four, 'Organizing a Local Convening.' The convening toolkit identifies the important components to organizing a successful first local convening. And this local convening is what's going to set you up for long term success.

The purpose of the convening is to bring together existing partners, potential partners, and other stakeholders into one space. This space is for you to share your vision and to enlist support. Remember, no single organization can do this work alone.

The convening is also an opportunity to hear from different voices regarding the issues they see new or previously unidentified challenges, and resources that can be brought to the table. Your first convening will also help you complete your action plan, which we'll be speaking about later.

This toolkit is comprised of many useful components, including a checklist, a project plan template, a sample run of show form, and a commitment form template. These resources will aid your team in organizing a successful community wide convening.

The checklist has several sections that will help you think through the planning process. We'll see a few of the sections in these upcoming slides. To support organizing your invitation list, this toolkit provides a few resources. A recommended list of possible invitees, including residents, government representatives, media, business and nonprofit representatives, and funders is presented on the slide.

It is important to be intentional about representation and invite individuals from a variety of backgrounds and organizations to ensure diverse perspectives are heard during your convening. It is also important to ensure that your organization's leadership has a prominent role. So, the importance of this work is conveyed to all participants gathered.

Finally, many successful communities have had their mayors or other local leaders help kick off their convenings. The location of your convening is also very important. The toolkit provides a list of considerations you should think about when selecting location. For example, you should consider choosing a central location with convenient access to public transportation. You should also think about whether the space is a neutral space where all attendees can feel welcome. There are many other suggestions in the toolkit, as you can see from this slide.

Another important component of the checklist is the guidance offered regarding the agenda setting process. The agenda of your convening will frame the direction of the conversation and can be used to obtain new ideas and resources. Be sure to prioritize agenda items that will help your team make progress and help you identify challenges that will need to be addressed. Make sure your agenda includes time for breakout sessions. Breakout sessions are a good way to target the three legs of the digital inclusion stool and to begin building relationships among participants.

We've included a sample agenda here from the convening held by the Tuscan HA. On the screen is an example of the template available for your core planning team's use when developing a plan for the first convening.

I've included only one step here, identifying convenient goals. However, in the original template there is space for each of the 13 steps recommended in the checklist for successful first convening. For each goal in subsequent action items, your core planning team will choose a lead for the action. This is the person who will coordinate the details and take on the responsibility of ensuring this action is completed.

The start date and completion date will help your team organize the timeline of the actions. Be sure to make the timelines realistic for your team. Both the resources and barrier columns are your chance to assess the action item and how your team will achieve the goal. Take time to understand what resources your core planning team has available and any challenges you may face during the process. And finally, a status update will ensure all members of the team are aware of progress for each of the goals and action items.

On the next side, we'll see a snapshot of the larger template. You can see here a sample of the competing project plan template. The project plan template contains all of the steps that are outlined in the checklist from identifying your goals for convening to setting attendee reminders. What we're showing here is just the first full page. Remember, you can download this and edit it to make it your own.

Next, we'll look at the sample commitment form. The toolkit includes a sample commitment form shown on the screen. You can download it for your use and customize where needed. We recommend having a commitment form available at each table during your convening. The commitment form asks existing and potential partners and stakeholders to offer support and work with the core planning team. The commitment form will help your team collect information regarding the type of commitment, which leg of the digital inclusion stool the commitment falls under, and other necessary information.

It is important to note that existing and potential partners may not be in a position to make a firm commitment at the convening so they can bring this form home and back to complete at a later date. But don't forget to follow up with them.

As with all of these templates, you can download it and edit to make it your own. The run of show template is another useful tool to help plan your convening. A run of show document outlines how your event will run on the actual day of the event. This template allows you to identify which team member will take on each of the different responsibilities throughout the convening. Additionally, the template offers a format for collecting information about presenters and the venue.

Staying organized is important to ensure that the competing runs smoothly and that everyone gets the most out of the time. Identifying leads for the tasks and finalizing all venue related information will help make the day of the event less stressful and more rewarding.

The third toolkit is the action plan toolkit. The ConnectHomeUSA action plan outlines your community's vision and overarching goals for narrowing the digital divide in your community. It also provides your team with a detailed roadmap and timeline for achieving key milestones toward your goals. Specific concrete and clear directives are particularly important for keeping our team grounded and aware of its mutual responsibilities. See playbook number five, 'Developing Your Action Plan' for more information.

The action plan toolkit will help you and your core planning team develop a successful and detailed action plan. The action plan toolkit contains the action plan checklist, the launchpad to the action plan and timeline template, and an action plan implementation template. Let's talk about what each of these components contains. We'll start with the launch pad to action plan and timeline template. This document allows you to see in one document the entire process we've been discussing during this webinar, in the format of concrete tasks and the timeline from setting up your core planning team to holding your convening and finally submitting your action plan. It's an Excel spreadsheet that has instructions tab, a sample timeline. And the third and final tab is a blank template for you to complete.

Use this tool to track your work and identify staff, leads, resources, partners, and timelines for achieving the steps needed to develop your action plan. As you can see, there is a place for each playbook within this template. With this visual, your core planning team can map out the process of your digital initiative and keep progressing with your work.

On the screen we have the launch pad here, action plan, timeline, and template. And we are currently in tab three. Tab three is the version you will use to personalize your core planning team's launchpad to action template. Tab two provides an example of what this may look like for your core planning team.

Now moving on to the action plan checklist. This document helps you think through what concrete goals you should include in your action plan, and it provides resources for additional information for you to consult as you develop the key elements of your action plan. Finally, there's the action plan implementation template itself, which is what we will look at next.

The action plan implementation template provides a chart that identifies each goal your core team will prioritize, and the important actions associated with each goal. For each goal, there are spaces for three action items that are needed. Additionally, there's a space for the team to identify a leader for the task, a timeline, the resources available to achieve this goal and space for any barriers or challenges that may arise.

This template, which you can modify, will help you organize an approach to fulfill each goal your core planning team identifies. Remember to consult notes from your first convening to see if there are any goals you may not have thought of that you should include.

Here is an example of an entry to the Action Plan implementation template. The sample goal we're using is to engage 100 new residents in digital literacy training. Therefore, one of the first action items is to market these trainings. Sarah from the library staff is leading the school and will be leading the first action item of marketing. She's beginning her marketing early before the training start date of March 1st. The library has the resources to fund the development of marketing materials, but Sarah will have to find assistance distributing the materials once they are created.

By utilizing this template, your team can identify goals, actions necessary, staff assignments, resources, challenges, and status updates. This document can allow you to identify solutions before you begin implementing action items. Please note that this document or similar one, may be requested by HUD as a part of your participation in ConnectHomeUSA.

Now we will move on to the partnership building toolkit. Partners are key to your ConnectHomeUSA program. As we've said, no single organization can do this work alone. With that in mind, we've developed a partnership building toolkit that aligns with playbook chapters two, 'Building partnerships,' and 11, 'Partnering with Schools.'

Your convening may have revealed additional organizations that you can partner with, but this tool kit will help you grow and maintain your partnership base. The partnership building toolkit will guide you through the phases of partnership building, from identifying existing and potential new partners to successfully maintaining and nurturing these partnerships. The partnership building toolkit includes a partnership building checklist, a partner communication strategy guide, a stakeholder mapping template, a partnership inventory worksheet. and a sample MOU.

Over the next slides, we'll cover what some of these items contain and how to use them. Here's a snapshot of what the checklist looks like. Although we won't dive into the details of each step in the checklist, there are some important highlights we would like to cover that you will see in the following slides.

The partnership building checklist lists the six key steps you see to help you identify and build partnerships. The checklist provides you with information that will help you implement each step. The six steps include defining the needs, engaging existing stakeholders and partners, identifying opportunities for new partnerships, establishing standards for partnering engagement, managing partner relationships, and expanding partnership opportunities.

Another component of this toolkit is the partner communication strategy guide. Strong communication is critical for successfully managing partner relationships over the long term. This guide describes five key elements of an effective partner communication strategy, and we recommend you spend some time with it. But we would like to highlight the following takeaway for you today.

In order to successfully manage the relationships between partners, developing consistent, reliable and accessible communication methods is essential. The partnership communication strategy guide can assist you in developing a communications strategy that will sustain these partnerships.

A highlight from the communication strategy guide is the RACI concept. RACI stands for responsible, accountable, consulted, and informed communication. The RACI framework is useful for defining the roles of partnership, staff and activities or decisions.

Understanding your partnership landscape is important. The stakeholder mapping template provides an example of how stakeholder mapping can be used to identify key partners, their primary areas of focus, and any gaps that may exist. The template can be downloaded and edited according to the needs of your community.

Communities may also find it helpful to undertake a collaborative stakeholder mapping exercise with existing partners using this template as a guide. Bringing partners into the mapping exercise will allow for a broader view of the landscape and a more robust list of current and potential partner organizations.

Now let's take a quick look at the partnership inventory worksheet. This document allows you to maintain a current list of partners and where their expertise lies. By identifying the organization, the lead contact, and their contribution to your digital inclusion initiative, your team will be able to identify where there may be gaps in resources, expertise, or capacity.

For example, if you have multiple partners in the connectivity category, but very few who can offer expertise and resources in the category of devices, this could pose a problem for your digital inclusion efforts. Your team can download this worksheet to get a better idea of your partnerships and where more support is needed.

If we click this link, it will take us to the partner inventory worksheet Excel. This worksheet gives you a space to keep track of your partner's roles, areas of interest, and contributions. These are items that need tracking so you can refer back to the worksheet and assess what partner could fill in if there is a new need for the project.

You can use it to keep a log of how much you have requested for each partner, and maybe even use it as a draft for when it comes time to send your thank you notes. We have a section for connectivity, devices, digital literacy, quality of life, partnership, and funding, and at the top here, you can see we have a column for the partner organization, the primary point of contact for that organization, the secondary point of contact. And the various roles that the partner organization may fulfill.

A memorandum of understanding or an MOU is a non-binding agreement between the partner organizations that establishes guiding principles for the partnership and articulates the common objectives and expectations of each partner. This toolkit includes a sample MOU for you to use. You may download the sample and fill in the necessary information, or you may adapt the structure for your own use.

The final toolkit we will review in part one of the ConnectHomeUSA webinar series, is the fundraising strategies toolkit. Fundraising is an important strategy to help sustain your ConnectHomeUSA efforts. The fundraising toolkit was developed to complement the playbook and ties primarily to chapter nine of the playbook, 'Securing Funds.' This toolkit explains key fundraising concepts and strategies that will help ConnectHomeUSA staff approach funders effectively. This toolkit consists of a fundraising strategies checklist and a research template for prospective funders.

The fundraising strategies checklist is made up of two parts. Part one walks you through various fundraising strategies, and the second provides a guide for how to develop your fundraising plan. The toolkit also includes three templates for printing. A fundraising plan template, a fundraising strategies template, and a budget template for fundraising activities.

In the next few slides, we'll go over some of the tips that are included in this checklist and tool kit. Although not exhaustive, the toolkit provides an extensive list of key steps for fundraising success and important strategies for connecting with possible funders. Let's go over the key steps that are outlined in this toolkit.

Step one is a needs assessment for understanding your funding needs in order to reach the goals that your core planning team created for your digital inclusion initiative, it is important to understand the resources that are currently available to implement the initiative, and the extent of resources that need to be raised. A needs assessment will help you understand your funding needs and help make an informed case to potential funders.

The fundraising plan template can help you begin identifying current available resources and recognize the gaps that need to be filled. The categories that the toolkit recommends you begin your needs assessment with are staffing, equipment and software, connectivity, training, physical space, among other considerations.

Important to a needs assessment is collecting accurate data that depicts the current resource landscape. Funders make grants to meet their objectives, and by providing recent and accurate data about your needs and accomplishments, you will help funders clearly understand how their support of your ConnectHomeUSA activities will not only help you, but importantly, help meet their funding objectives. The second step is to create a program budget and fundraising budget. After a needs assessment is completed, your team will have an understanding of what resources are needed to reach the goals you've identified during the process outlined in the action plan toolkit. Both the program budget to fund the efforts during the digital initiative and a fundraising budget to support your fundraising efforts will be necessary. For information regarding sources of funding and templates to guide your team through this process, refer to part two of this toolkit,' A Guide to Developing a Fundraising Plan.'

The third step is research potential funding sources. Step three of this toolkit provides categories of funders that the ConnectHomeUSA communities may consider when researching potential funders. For additional assistance researching and identifying sources of funds, refer to part two of this toolkit. Use the separate research template for prospective funders to track which funders you will reach out to. This document allows you to also list which areas funders invest in and whether there are funding restrictions.

Step four is to develop your fundraising plan with fundraising goals calculated and sources of funds identified, you may begin planning the fundraising process. The fundraising plan includes three parts identifying outreach strategies, creating a timeline for implementation, and estimating the funds and other resources you will need for your fundraising activities.

The fifth and final step is to implement your fundraising plan. The three strategies for communicating with potential funders include outreach methods. Incorporating a variety of outreach methods in your communication strategy is important because funders have different preferences for how they accept solicitations. The toolkit recommends using the network you already have in place to build relationships with new funders, inviting potential funders and partners to digital inclusion events to show your work in progress, and include them in the important work you are doing, create proposals that are unique, and incorporate the individual requirements of each vendor and use a variety of communication methods.

The second strategy is communicating about your organization and program mission. Developing materials ahead of time is especially useful. Presentations, data points and talking points that are prepped in advance provide a platform to help your core team appeal to donors in real time.

Finally, expanding the funder network. Building in time to develop relationships with funders is important to managing your ConnectHomeUSA program effectively and can ensure continued growth and success. Fostering existing relationships and engaging in funder stewardship are two key strategies for expanding your funder network.

Next, let's take a look at funder stewardship. Funder stewardship refers to the types of activities that demonstrates your appreciation and acknowledgment of your funder's contributions. The toolkit provides a stewardship matrix to guide you through this process. The metric also allows you to track the type of stewardship activity you've undertaken to show support of your funders.

Key stewardship techniques include setting aside time on a monthly basis for making thank you calls, inviting donors to participate in ConnectHomeUSA activities, holding a special event to honor all donors, sending handwritten cards or important dates, providing regular updates to funders about progress and areas of need so they are aware of additional contribution opportunities, and developing a plan to maintain the stewardship practices.

Now that we have covered a few fund-raising strategies, we are going to explore the guide to developing a fundraising plan, which is found in part two of this toolkit. A fundraising plan is a document that organizes and outlines fundraising activities over a certain period of time. The fundraising plan template included in this toolkit outlines the process and offers insight on the actions and goals to prioritize. The main components of a successful fundraising plan include identifying potential sources of funds. The toolkit provides a list of possible sources of funding. However, every community is different, so it's important to consider alternative funding that may be available in your area.

Setting a fundraising goal. The fundraising template included in step two of part two of this guide will guide you through setting a fundraising goal. To do so, it is important to account for available resources and funds and compare it to the total amount needed. This will help your team identify the funding gap, which is your fundraising goal.

Selecting fundraising strategies. Step three of part two in this toolkit includes a template that provides options for fundraising strategies, and finally, creating a fundraising budget. Fundraising has associated costs, and therefore it is important to account for these costs when identifying a budget. The budget template for fundraising activities will organize your team and help identify which actions have costs tied to them.

The fundraising plan template helps you think through the costs your program might have for different digital inclusion activities, the resources you already have, and the gaps. Your fundraising goal is the gap in these resources. The fundraising strategies included in the toolkit are not exhaustive, but they do provide a strong starting point for your team. This fundraising strategies template can be used by your team to determine which fundraising strategies make the most sense for your community.

As you can see on the screen, there's a good list of fundraising strategies, including large fundraising event, networking, special events, smaller online fundraising or crowdfunding campaigns, giving days, recurring monthly donations, direct mail, fundraising calls, and email marketing.

Depending on your community, your core planning team may decide which fundraising strategies make the most sense for your initiative. Remember, your fundraising activities will have a cost associated to them. So, it's important to budget for them too. Estimate how much each selected fundraising activity will cost and how much revenue it could generate. Ensure the time and staff needed to organize each activity is included in the cost and designate how incoming funds can be leveraged to support your ConnectHomeUSA Initiative.

That concludes part one of the ConnectHomeUSA webinar series. Be sure to watch part two of this webinar to learn more about the following kits and guides. Part two will discuss the media guide and toolkit, the virtual event planning toolkit, the resident engagement and best practices guide, the coalition building best practices guide and the digital literacy resource guide.

If you have any questions, please do not hesitate to reach out. Our ConnectHomeUSA team is eager to help you as you begin implementing your digital inclusion initiative. Thank you all for listening.

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