STATES FOR THE FUTURE

A Data to Policy Network

Step-by-Step Guide

To Planning an Organization-to-Organization Knowledge Sharing Session

Introduction

Collaboration is essential to driving success and innovation and plays a pivotal role in supporting and advancing the efforts of organizations engaged in research and advocacy. Organization-to-organization (org-to-org) knowledge sharing sessions can serve as catalysts, uniting diverse entities to exchange insights, build connections, and cultivate growth.

Org-to-Org Knowledge Sharing Session

Each organization comes with its own context, history, resources, and perspectives. Knowledge sharing sessions provide an opportunity for individuals within an organization to connect with counterparts in another organization to "talk shop," exchange ideas and share insights.

By harnessing collective intelligence and experiences, organizations can gain numerous benefits, including but not limited to:

- **Amplified Advocacy:** Empowering organizations with a stronger collective voice that enables advocacy and change across geographies or interest areas on a broader scale.
- **Enhanced Innovation:** Developing synergistic ideas and solutions, having diverse perspectives and approaches in one room.
- **Faster Problem-Solving:** Pooling collective expertise and insights to tackle challenges together.
- **Effective Learning:** Learning from each other's experiences, and sometimes, recognizing when "reinventing the wheel" is not necessary.
- **Strengthened Relationships and Networks:** Building relationships and fostering partnerships that not only expand an organization's network but also open doors to new opportunities.
- **Improved Decision Making:** Developing solutions and making decisions that consider an array of factors at the systemic level.

This guide is a step-by-step guide for those interested in setting up their own org-to-org knowledge sharing sessions to unlock the opportunities that come with collaboration.

Step 1

Define your Objectives and Goals

Any dedicated time spent sharing and learning with another organization should have a clear purpose and well-defined goals.

What do you Want to Know?

Clearly articulate why you're organizing the event (e.g., knowledge exchange, collaborative project exploration, capacity building, etc.). What do you want to know that will better support you and the work that you do? This should serve as the guiding question that will lead your discussions.

Below are some example goals:

- **Functional Team Deep Dive:** Explore a specific functional team/department within an organization to gain insights and strategies (e.g., policy work on natural resources, developing public opinion polls, communications strategies for housing reform, etc.)
- **Governance and Operations Insights:** Learn about different approaches to organizational governance and operations and their trade-offs.
- **Origin Story Discovery:** Understand how an organization came to be, gaining insights into stakeholder mapping, fundraising, recruiting, and developing a board of directors, etc.
- **Strategic Framework Development:** Discover the steps involved in developing a strategic framework or long-term goals, enabling you to shape your own.
- **Service Offerings Exploration:** Gain in-depth knowledge about an organization's service offerings, uncovering opportunities for collaboration or inspiration.

By defining your event's objectives and specific goals, you set the stage for meaningful discussions and fruitful knowledge sharing.

Who Should Be in the Room?

Often, having leads of each functional area participate in this discussion provides for well-rounded and representative conversations and ideas.

When defining the objectives of your event and the organizations you want to involve, you should be thinking about these questions:

- What is the purpose of the meeting? What specific goals do you want to achieve?
- What problems or questions are you and your organization trying to resolve vs. those of the organization that you plan to meet with?
- What are their needs? What are your needs? How will this be meeting address those needs?
- What does success look like for each of our respective organizations?

Step 2

Collaborate on the Logistics, Execution, and Facilitation of the Event

Date, Time, and Venue, and Execution of the Event

Choose a suitable date, time, and venue/virtual platform that accommodates participating organizations. Remember the aim is to make it as easy as possible for others to participate. Part of this process will include outreach and stakeholder engagement (e.g., one-on-one emails, an online poll such as Doodle to align on schedules and availability). Assign people to facilitate discussions for the day and someone else to take meeting minutes.

Participants

When planning for the meeting, try to ensure that similar numbers of staff from each organization will attend. Keep the group small enough that all attendees can participate in the discussion and have space to ask questions. When possible, include similar roles from each organization so that attendees can form relationships with their counterparts or “role-alikes” (e.g., policy, operations, program, communications or data and analytic leads from each organization).

Step 3

Create an Agenda that Leaves Room for Flexibility

From experience, we found the most effective approach for these types of exchanges is to have an informal meeting guided by organic questions and discussions. If possible, use presentation slides to display guiding questions and context. Depending on the amount of agenda items, 60 minutes may be sufficient, but often, reserving 90 or 120 minutes allows ample time for knowledge sharing and in-depth discussion.

Co-Develop the Agenda

In the spirit of collaboration, co-develop the agenda to ensure that both organizations attending can meet their respective goals and shared expectations. Collaborating on the agenda will also ensure that participants are involved in the planning process, making them more prepared and engaged. When distributing the agenda, make sure you share information on who is participating and their roles.

Below is an example of an agenda for reference:

- **Introduction & Housekeeping:** Begin the event with a brief welcome address, outlining the event's purpose, agenda, and ground rules.
- **The Icebreaker:** Facilitate icebreaker activities or questions to help participants get to know each other. This should encourage them to introduce themselves and initiate discussions.
  - What is your favorite place to watch the sunset near where you live?
  - What are some unique traditions or customs at your state legislature?
  - What do you consider the quintessential meal or dish in your city/state?
- **Introduce the Guiding Questions:** Present the meeting's framework to prepare participants for an open dialogue but allow the natural peppering of questions and organic discussions to happen.
  - How did your public opinion poll come about and how did you execute it?
  - How are you dealing with opposition to housing reform at the state level?
  - How did you develop your strategic framework?
  - We would like to learn more about your service offerings.
  - We would like a deep dive into your recent natural resources policy and advocacy efforts.
- **Conclusion & Key Takeaways:** Determine the main takeaways following this meeting, and the next steps (if any).
  - How can we continue this conversation?
  - Let's set up a follow-up to this call to dive deeper into this topic.
  - Who would be the right organization to connect with to learn more about this topic?

Step 4

Follow-up & Continued Engagement

Follow-Up

After the meeting, assign someone from each organization to follow-up with resources and contact information. Make sure you send any related resources and the key takeaways gathered during the event. If possible, collect feedback from participants to assess the event's success and gather insights for future improvements using an online form (e.g., Survey Monkey or Google Forms).

Post-Event Networking

Facilitate ongoing networking opportunities for organizations that connected during the event. This can be done by reconnecting on an annual basis or encouraging regular knowledge sharing calls between functional leads at each organization.

Conclusion

This guide provides a framework for setting up your own knowledge sharing session. Use it as a launchpad to initiate more cross-state connections that will help navigate through the intricacies of our work and achieve better outcomes for our residents, and ultimately our nation as a whole. By embracing co-creation and collaboration, we not only unite diverse organizations but also harness collective ideas, solutions, and opportunities that have the potential to effect change on a broader, systemic level.

If you have any questions on how we organized our organization-to-organization events, or any other questions related to this resource, please feel free to email us at

info@statesforthefuture.org.

Additional Resources

Why and How Do Nonprofits Work Together

Philanthropy News Digest
By May Samali, Nathalie Laidler-Kylander, Bernard Simonin, Nada Zohdy

Learning from Peer Organizations: Nonprofits Must Expand the Definition

Stanford Social Innovation Review
By Craig Shelley

Interorganizational Collaboration: A Social Capital Framework

Alfred P. Sloan Foundation Annual Conference on Industry Studies
By Ingrid M. Nembhard, Ph.D., M.S.