

# DESIGNING YOUR OWN 2GEN CONVENING

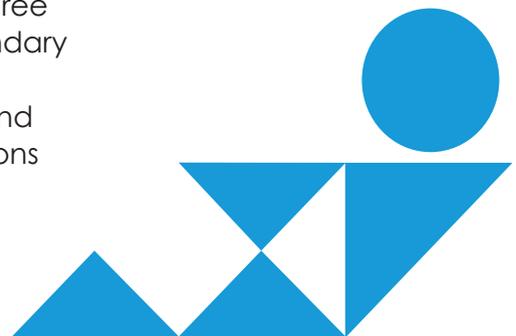


# WHAT MAKES ASCEND CONVENINGS DIFFERENT?

Since Ascend launched in 2011 as the national hub for breakthrough ideas and collaborations that move children and the adults in their lives toward educational success, economic security, and health and well-being, convenings have been an integral part of our work. Ascend convenings – strategic gatherings that bring together new and established partners and organizations to explore, co-create, and implement solutions for families with low incomes – are designed with intentionality and action at the forefront. Our convenings are not just a mechanism through which Ascend facilitates better understanding and deepening of two-generation (2Gen) approaches; these convenings are also an important venue for communities to share their 2Gen frameworks, identify opportunities for partnership, and create roadmaps for implementation.

Since 2011, Ascend has hosted more than 50 convenings, including roundtables; strategic conversations; webinars, large-scale forums, and the Aspen ThinkXChange, the national forum on two-generation solutions. We have also worked in more than seven cities and communities to co-design 2Gen “summits,” that are cross-sector, one- or multi-day convenings that bring together policy and practice leaders, parents, institutions and philanthropy to focus on opportunities for building a 2Gen approach locally. This toolkit is designed to support these large-scale summits in communities across the country; the lessons and principles can also be applied to smaller convenings.

In March 2011, Ascend hosted Two Generations, One Future, a roundtable focused on identifying and elevating approaches that support the needs, strengths, and opportunities of children and the adults in their lives together. Since this inaugural roundtable, Ascend has hosted 13 leadership forums for Ascend Fellows; three Aspen ThinkXChanges; two 2Gen Policymakers Institutes and one 2Gen Practice Institute; three Aspen Early Childhood and Health Forums; two Postsecondary Success for Parents roundtables; and a number of other strategic conversations, roundtables, and webinars. Ascend convenings are catalysts for surfacing ideas and innovations that have shaped the 2Gen field into what it is today.



This toolkit contains resources and incorporates the many lessons that have been learned from the summits Ascend has partnered with communities to design over the past eight years. Ascend has been asked many times for its guidance and feedback on 2Gen convening design. In response to these requests, we have developed this toolkit as a resource for the field, reflecting the principles of Ascend's convening approach and design.

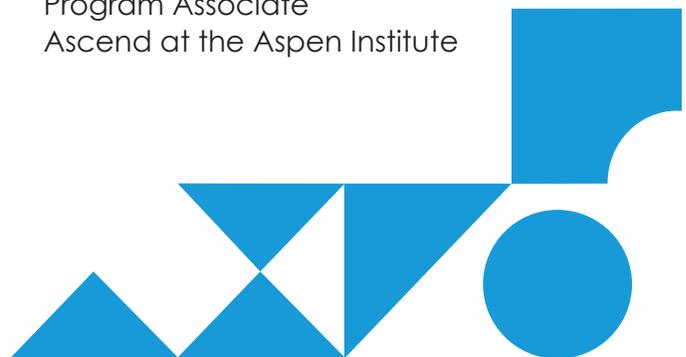
The **goals** of the toolkit are to:

- Provide an effective resource, curated and compiled to reflect lessons and tools from a variety of two-generation summits to maximize impact and reduce time spent on agenda design by others in the field;
- Leverage lessons learned from 2Gen convenings in key communities so that future efforts build on lessons and are strengthened in impact, outreach, and partnership, and incorporate a racial-equity and gender lens;
- Highlight and make more accessible expertise from the Ascend Network and Ascend Fellows by sharing ideas, principles, and resources that lead to increased partnerships and collaborations across sectors.

Leveraging the lessons that are highlighted in this toolkit, Ascend Network Partners have led the development and implementation of 2Gen Summits in Sarasota, Florida; Los Angeles, California; Bay Area, California; Twin Cities, Minnesota; Central Indiana; and Birmingham, Alabama, and regional offices of the Administration for Children and Families (ACF), among other communities. Local coalitions have engaged the resources found here to deepen and strengthen 2Gen approaches in cities, states, and nationwide.

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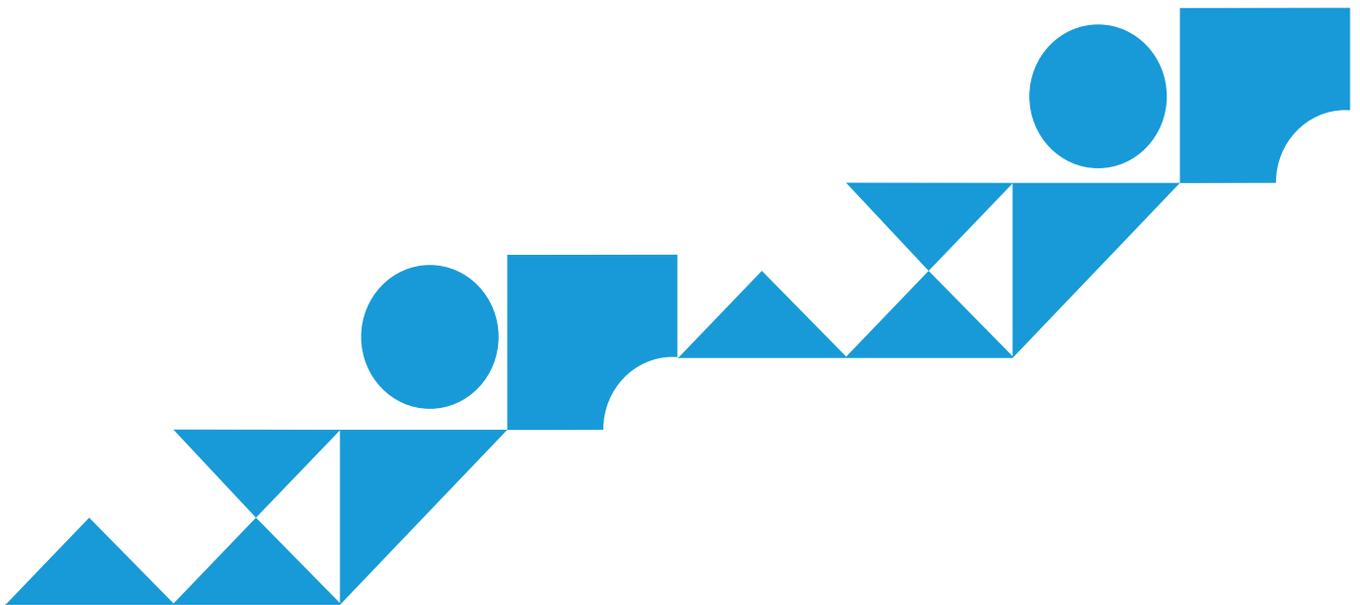
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## WHO IS THIS TOOLKIT FOR?

Since its launch in 2014, the Ascend Network has grown from 58 to more than 350 organizations in nearly all 50 states. This toolkit aims to support our Ascend Network partners as well as organizations and leaders beyond the Ascend Network to design and host convenings that spread knowledge and understanding of the 2Gen philosophy; offer concrete tools and resources for partnering on and scaling 2Gen approaches; and identify strategies to ensure parent voices are authentically reflected, and a racial-equity and gender lens are at the center of these efforts. In developing this toolkit, we have drawn upon lessons from, and aim to further support:

- Nonprofit leaders in communities that represent 'platforms for scale,' organizations with the capacity for influencing systems change, including but not limited to United Ways, Goodwills, Head Starts, Community Foundations, and community colleges;
- Local, state, and regional practitioners and policymakers seeking tools and partnerships for spreading 2Gen efforts through a convening; and
- Philanthropists seeking to support mechanisms that can inform and scale 2Gen efforts in their communities.



# PART I: THE WHY

## EXPLORING WHETHER A 2GEN CONVENING IS RIGHT FOR YOUR COMMUNITY

### KEY CONDITIONS/CRITERIA FOR EFFECTIVE 2GEN CONVENINGS

This work has revealed that there are key conditions and important criteria for ensuring an effective, results-oriented, equity-centered convening that can lead to better outcomes for families. These are drawn from summits hosted by Ascend Network Partners including the Women’s Fund of Greater Birmingham, Abriendo Puertas, Administration for Children and Families (ACF) Regional Summits, Community Foundation of Sarasota County, and United Way of the Bay Area, as well as lessons from Ascend’s own convenings. In many instances, these conditions and criteria will reflect the conditions that communities seek to develop to incubate and implement 2Gen approaches.

- 1. Explicit outcomes rooted in family strengths:** ensure that the outcomes you are seeking from the convening reflect and are informed by the resilience and strengths of families. For example: in Birmingham, Alabama, the Women’s Fund of Greater Birmingham created a “Collaboration Institute” that integrated 2Gen grant opportunities for partners with an explicit measure on leveraging and tapping family voices.
- 2. Racial equity lens:** just as it is an important principle of 2Gen approaches, a racial equity lens for a 2Gen convening must be a condition that results in the bringing together of new and established partners to look critically and creatively at how a community addresses intergenerational opportunity. How is a racial-equity lens being applied to both convening design, speaker and participant lists, and outreach? What are the demographics of the community and how are the voices of those most impacted by ideas generated at the convening being heard? What is the history and journey of the anchor partner in the context of racial equity, and how will that be addressed?



3. **Parent participation:** integration of family voices in practices, policies, and strategies for families is a key 2Gen principle (see page X). It is also important to consider ways to engage parents in the design of convenings, tapping community-based partners to support parents in giving their time and perspective to the anchor, or host, partner. A stipend to compensate parents for their expertise and to cover their time, potentially lost wages, and child care costs is also critical, as is ensuring that multiple parents are invited to participate.
4. **Anchor partner:** an anchor partner is the hosting organization for a 2Gen convening. Accountability and central coordination are critical when designing a convening that brings together multiple partners. Who will 'hold' the work before, during, and after the convening?
5. **Cross-sector engagement:** a key tenet of 2Gen approaches is that they transcend disciplines, industries, and sectors by addressing the needs and strengths of the whole family. Similarly, a convening designed to identify and support the growth of these approaches in a community should include the partners who reflect their potential implementation. For example, in September 2017, the six New England states in Region I of the Administration for Children and Families (ACF) came together in Portland, Maine to explore 2Gen approaches and implementation. Teams from each state included philanthropic, nonprofit, parent, federal, state leaders.
6. **Evaluation and assessment strategy and tool:** as the 2Gen field continues to grow and deepen, proof points that indicate the efficacy of these approaches are critical. The convening assessment should align with the anchor partner's overall measures of success for their 2Gen lens and/or approach. As part of their journey, the Community Foundation of Sarasota County collaborated with their partners to develop a list of shared goals and outcomes for children and families in the county. In order to ensure these goals were met, they hired an external evaluator to track progress and produced an MOU making data and information collected through their 2Gen journey available to key stakeholders. The United Way of the Bay Area utilized Ascend's "[Making Tomorrow Better Together](#)" to identify appropriate outcomes, evaluation benchmarks, and conceptual frameworks for achieving desired results.

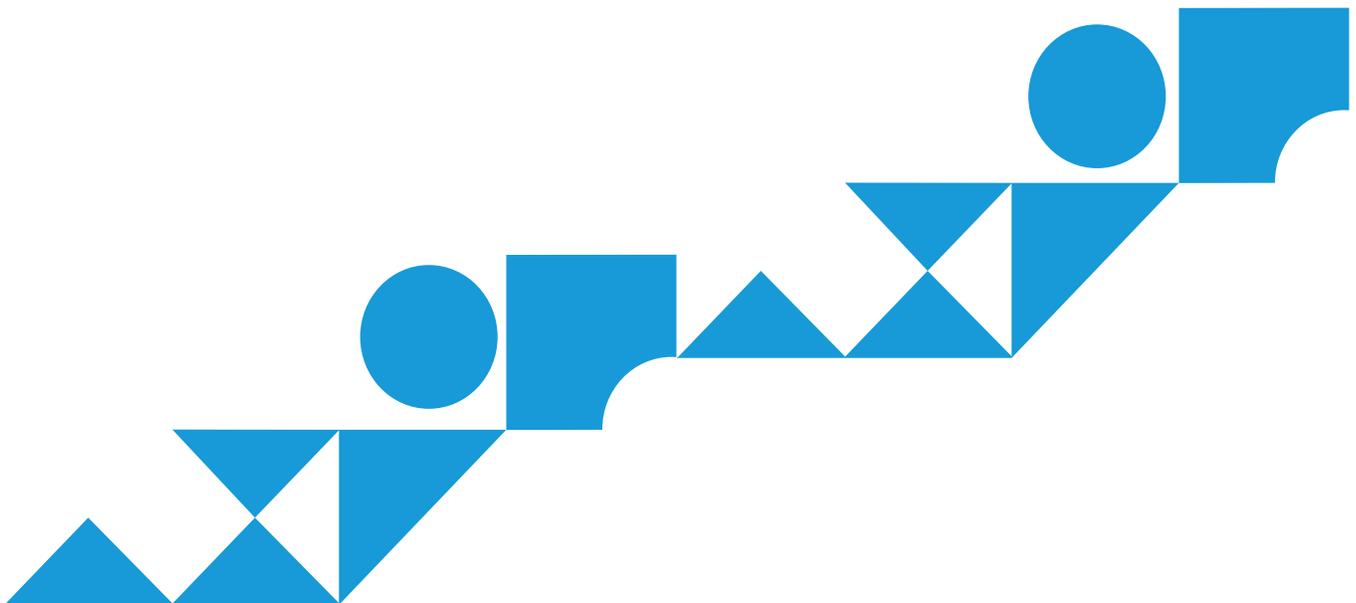
## KEY QUESTIONS TO EXPLORE PRIOR TO LAUNCHING A CONVENING

- What are the convening's 2Gen goals?
- Why is a convening the right mechanism for advancing our 2Gen goals?
- What type of convening is most effective for advancing our goals?
- Which partners can ensure we have parents at the table for design and execution? How do we most effectively engage parents?
- What is the funding strategy for the convening?
- How will participants be engaged in follow-up from the convening? Is there a funding opportunity as a result?



## STAGES OF 2GEN IMPLEMENTATION

- **2Gen Unaware:** Programs and systems are fragmented due to historic siloes and a limited understanding of the 2Gen framework.
- **2Gen Awareness Raising:** Stakeholders are beginning to learn about 2Gen and are engaging others to learn more.
- **2Gen Approach:** Stakeholders are aware of and support existing 2Gen organizations and move on the development of others if there are any gaps.
- **2Gen Strategy:** Cross-sector stakeholders are working collaboratively to align and coordinate programs, policies, organizations and systems to reflect the 2Gen framework and ingrain it in their mission.
- **2Gen Community:** Cross-sector stakeholders are working collaborative to provide services to both children and adults simultaneously.
- **2Gen Integration:** Both children and adults are being simultaneously served in multiple programs across multiple sectors.
- **2Gen Accountability:** Long term sustainability is evident in: understanding the 2Gen framework; development of 2Gen organizations, programs and policies; alignment and coordination of programs, policies, and systems; provision of services to children and adults simultaneously; and evaluation of outcomes for both parents and children to support improved outcomes for families.



## PART II: THE WHAT

### DESIGNING AND IMPLEMENTING AN AGENDA THAT ALIGNS WITH YOUR COMMUNITY'S JOURNEY

For anchor partners, a 2Gen convening requires thoughtful planning and preparation; in the two months prior to the convening, anchor partners have reported at least 25 percent of one staffer's time is devoted to the convening. In addition to ensuring key conditions are in place, it is important to confirm that fundamental 2Gen principles are guiding the agenda design and execution. Below are a few examples of key considerations for how to elevate 2Gen principles in the creation of a meaningful and impactful agenda.

- **Laying the foundation:** It is critical that a 2Gen convening be planned with purpose and intention. Ascend recommends using planning guides such as a shared convening overview to outline goals, objectives, watch-outs, audiences, outcomes, communication and follow-up strategies, and other important aspects of the convening as a first step for planning. Explicitly articulating this information in a planning guide will also provide language and mechanisms for connecting each aspect of the convening to its larger mission.

#### Outlining your goals:

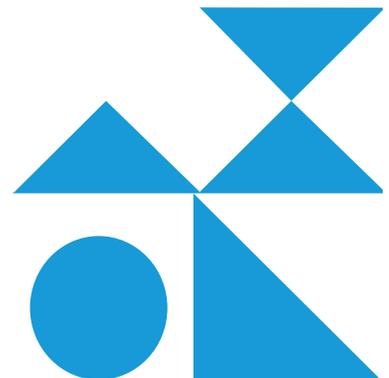
- A summit agenda requires that you articulate specific goals for your 2Gen work and design sessions that will support the achievement of those goals. The goals should reflect the 2Gen principles while elevating the desired outcomes laid out by your community partners. The agenda provides a concrete place to share the goals with your audience. The goals can also be referred to by speakers throughout the convening as they weave individual session themes back to the larger purpose of the convening.

#### Budget documents:

- Creating a budget as a foundational tool is important. Setting a general budget at the beginning of the planning process provides guidelines for the format and size of the convening. It will also be necessary information for funders and partners investing in the convening and the work.

### 2GEN PRINCIPLES TO GUIDE AGENDA DESIGN

- Measure and account for outcomes for both children and their parents
- Engage and listen to the voices of families
- Ensure equity
- Foster innovation and evidence together
- Align and link systems and funding streams



- **Ensuring parent voice is at the center:** one of the central tenets of the 2Gen approach is family voice at the center. No 2Gen convening is complete without the input of the families served by this work. One of the many ways to incorporate family perspective into a convening is to invite them to be speakers and attendees. Ascend's commitment has been to opening each convening with a panel comprised of parents, as well as including parents throughout the convening as expert participants. We recommend this as a model for authentic parent engagement and commitment to the work.
- **Session Design:** 2Gen convenings can be comprised of a variety of session structures. Each type of session serves a different purpose. Using the desired outcomes as the North Star, the structure of the session that will be most conducive to achieving your goals can then be determined. It is important to identify the organizing principle of the convening, which builds from the goals, but also from a range of tools useful in understanding, sequencing, and implementing 2Gen approaches. These include:
  - Review of the 2Gen Core Components
  - Exploration of process outcomes (For example, culture shifts; program and funding alignment; plans for data and research), as highlighted in "Making Tomorrow Better Together"
  - Identification of effective cross-sector partners and/or collaborators, including across education, health, family economic security, as well as business, public sector, and philanthropy.

## SAMPLE GOALS

- To educate regional leaders on the two-generation strategy and elevate examples, data, and information on applying 2Gen in the Alabama region. (The Women's Fund of Greater Birmingham 2Gen Summit)
- Offer time and space for questions and responses on key 2Gen challenges and opportunities at the local, state, and federal levels (United Way of the Bay Area 2Gen Summit)
- To solidify existing support and to expand our network in the state both across sectors and across geography. To share knowledge, raise visibility, and enlist the support of decision-makers in Minnesota who have the power to advance Two Generation Approaches to Reduce Poverty. (Minnesota 2Gen Summit)



- Ascend convenings often include a mix of the following types of sessions:
  - **Plenaries** are opportunities to reach your entire audience at once. During plenaries, context for your work that ties directly back to your goals and 2Gen application can be shared. And, of course, plenary sessions are also a perfect time for inspiration!
  - **Presentations** share valuable information with the field. They often come in the form of research, best practices, data, and other findings that support the expansion of 2Gen strategies.
  - **Panels** create the opportunity to bring together diverse perspectives from the field. They feature key stakeholders as speakers, provide multiple opinions and experiences, and highlight innovators modeling 2Gen best practices.
  - **Breakouts** allow for interaction with and by attendees. They allow individuals to connect on specific topics, co-create strategies or solutions, and strengthen the professional relationships and familiarity among attendees.
  - **Reflective time** can be scheduled throughout the convening, and is often the focus of closing sessions. They create space for candid feedback and final thoughts from participants and are an opportunity to re-center the audience to the goals and desired outcomes of the convening as well as any action and follow-up participants may wish to or be invited to take.
  - **Networking** time has been reported by attendees to be some of the most valuable time at 2Gen convenings. The time can be structured or unstructured. Sharing the names of confirmed speakers or attendees, with the opportunity to network with them, is an attractive draw for audiences, which often leads to the surfacing of new connections and coordinated action.

## PLANNING COMMITTEE BEST PRACTICES

- Ensure at least two parents are part of the committee
- Apply a racial-equity lens
- Prioritize details
- Prioritize data collection and evaluation
- Be realistic about the time commitment
- Consider how the selected venue reflects the anchor partner's values
- Consider participant expectations given the role of the anchor partner in the community.



- **Maintaining an equity lens:** is critical in planning and executing a successful convening. Opportunities to explicitly promote equity and inclusion in a 2Gen convening include:

#### Pre-readings:

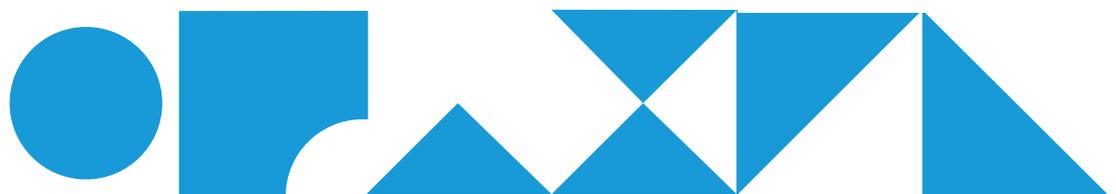
- Brief texts that may spur new thinking or generate reflection in advance of a convening, are a tool Ascend at the Aspen Institute often uses. While not essential for a convening, pre-readings can reinforce key themes and messages and provide a shared touchstone for participants. If you select a pre-reading, consider passages that highlight diverse and/or underrepresented perspectives. Explore readings that are culturally competent and relevant to the attendees and the goals of the convening. See the sidebar for more information on the history of pre-readings and a link to sample texts.

#### Speakers:

- Should reflect diversity of demographics, perspectives, and areas of expertise. Take into account race/ethnicity, gender, geography, age, job title, among other things, to ensure you are capturing the breadth and depth of 2Gen experiences and ideas. While speakers representing national perspectives are powerful, it is also important to tap the expertise and experience of local leaders.

#### Registration & outreach:

- To ensure participants represent the intended audience and populations served will be further discussed below, and strategies that reflect an equity lens might include: explicitly stating your commitment to equity in the registration page, and intentionally inviting people from a diverse range of organizations and sectors.



- **Logistical planning:** through the preparation of the foundational planning documents discussed above, determination of the type and structure of the most appropriate convening can be made, forming the basis to develop a logistical strategy. Logistics to consider include:

#### Venue:

- Secure a location that is representative of your community, that provides enough physical space to comfortably accommodate the desired number of attendees, and enough metaphorical space for people to have honest dialogue and collaboration. Accessibility and flexibility are important in ensuring that all attendees feel comfortable to fully participate.

#### Accommodations:

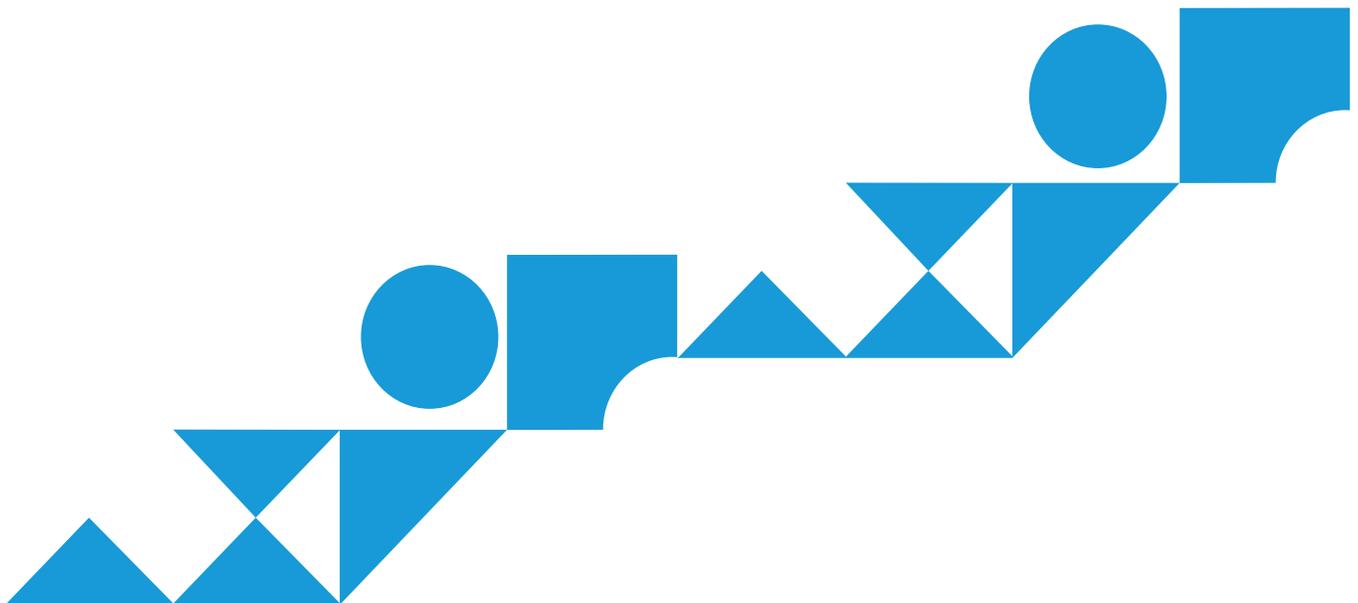
- Some attendees' participation may be contingent on their access to public transportation (and these schedules), particular food (vegetarian or gluten free), and lactation rooms, among other factors. Ensure that your convening location can accommodate any known and anticipated needs of your participants.
- **Partnership & stakeholder engagement:** even in close-knit communities, there are often several known “experts” on 2Gen topics. Develop an invitation list that also includes philanthropic partners, researchers, policymakers, practitioners, community members, and others working on these issues. Be mindful of any power dynamics and cultural norms that often influence who and how people participate; and be intentional in bringing new voices to the table.



# CONVENING MATERIALS

The materials distributed to participants are powerful tools for shaping the convening experience, providing context and guidance, as well as encouraging any follow-up or action.

- **Sample agenda design:** a 2Gen convening agenda should include goals of the convening, the key themes and speakers, and an outline for the flow of the convening conversation. Sample agendas for 2Gen convenings can be found [here](#).
- **Pre-readings:** Grounded in the Aspen Institute's long tradition of Socratic dialogue, Ascend often provides convening attendees with pre-readings to ground the conversation in common principles, values, or themes. Pre-readings are historically relevant texts by diverse and thought-provoking authors. They can be used in opening or closing remarks, as well as conversation-starters for small group discussions. Equally important to selecting the pre-readings, is engaging a skilled facilitator to lead a discussion or debrief about the reading and its relevance to the content of the convening.
- **Post-Convening Evaluation:** is used to assess professional connections made or strengthened by participants and to gather feedback on the format, speakers, topics, and other aspects of the convening. It can also be designed to invite ideas and suggestions for next steps, additional topics or issues of challenge, or successes, all of which may be helpful in designing continued support for the attending participants or the field. A sample evaluation can be found [here](#).



# PART III: THE IMPACT

## ENSURING MOVEMENT FROM 2GEN AWARENESS TO ACTION

A convening lays the groundwork for movement toward 2Gen approaches and better outcomes for children and families. As a convening is a significant investment of resources, it is key to establish and implement mechanisms to continue any action or next steps identified at the convening and identify ways to support that action for follow-up to ultimately drive long term change. Examples of such mechanisms include:

- **Implementing Feedback Loops:** In order to keep participants engaged in the work and sharing details on their next steps, it is important to create mechanisms for feedback. One popular strategy is the post-convening survey. In these short surveys, we recommend soliciting specific information about connections made due to the convening itself, as well as concrete action steps attendees plan to take as a result. Where appropriate, convening organizers can also conduct follow-up outreach to partners to track action steps that resulted from the convening. Feedback loops will provide clear ideas of where community momentum exists to create change.
  
- **Funding:** recommendations for engaging the philanthropic community have been provided by our partners who have experience in building community-based initiatives, including:
  - Invite funders to the table with providers, allow both to share their opportunities and challenges, and identify areas of alignment for long-term investment and priority funding.
  - Actively solicit funder input and feedback, as they often have a wealth of knowledge and access to resources that can be useful to the community. By engaging funders in this manner, it encourages partnership for long-term action.
  - Analyze feedback from the participant evaluations, as they often identify emerging or new opportunities for funder investment.
  - It may not be necessary to start from scratch. Attract funders' new or continuing commitments by building on existing programs and successes, and identifying ways to work together.



- **Policy:** policymakers are also a key stakeholder group to be included in 2Gen convening planning. Policymakers may include officials at the city, county, state, and federal level. Some recommendations for fueling lasting policy change through your 2Gen summit include:

#### Facilitate cross-agency partnership:

- Invite leaders from various agencies who are engaged in 2Gen work. Consider developing a session or two of the convening for leaders who have had success in cross-department, cross-sector, or cross-geography partnerships to share their strategies (successes and mistakes). Inviting a variety of policymakers (across political parties) to speak and participate provides a forum for them to connect with each other, and engages them more deeply in the work.

#### 2Gen Advisory Councils:

- One way to ensure continued policy change in support of 2Gen is to work with your state to start a 2Gen Committee within the legislature, or, if a local entity, a city council or cross-community task force. Connecticut has successfully incorporated the requirement for a 2Gen Advisory Council into their legislation. It mandates assembling community and state leaders, advocates, and scholars to ensure state solutions to breaking cycles of poverty incorporate the entire family.
- **Learning Community:** the most effective 2Gen approaches are collaborative by nature. Bringing together advocates from your city, state, or region to further 2Gen efforts is a great starting point for the formation of a larger-scale 2Gen learning community. It is likely that attendees of a 2Gen convening will be eager for next steps. By facilitating the development of authentic connections among practitioners, policy makers, community members and others, seed for further collaboration are planted and a launchpad for future activity is built. Ensuring that follow-up action is an invited, perhaps even expected, outcome of the convening will set the right tone for participants even prior to arriving at the convening. Be clear and consistent in articulating to participants before, during, and after the convening, the specific ways in which they can stay engaged and continue to move 2Gen forward in their community.

## BEST PRACTICES FOR DEVELOPMENT AND IMPLEMENTATION OF POST-CONVENING EVALUATIONS

- Always provide the opportunity for feedback
- Provide an incentive for evaluation completion
- Use evaluations as a tool to measure connections made and to capture outcomes and feedback
- Analyze the results and use them to design follow-up and future investment



- **Incentivized Collaboration:** asks that organizations consider the mechanisms they have in place to inspire, encourage, and facilitate 2Gen learning, collaboration, and approaches.

#### 2Gen staff:

- Ensures there is accountability for 2Gen progress in an organization by hiring someone to continue the work. This person can help facilitate organizational change through various levers including funding, programming, and future hiring.

#### 2Gen funding:

- Provides for dedicated financial resources for 2Gen projects. This could come in the form of baking 2Gen language into RFPs, applying to 2Gen grant funds, among others.

#### Time:

- If your organization or your partners are not already fully committed to 2Gen approaches and measuring 2Gen outcomes, a significant investment in time may be required to redesign organizational processes and practices, and shift organizational culture.

## RESOURCES

- [2Gen Toolkit 101](#)
- [2Gen Toolkit 201](#)
- [2Gen Toolkit 301](#)



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*"I've already started engaging our leadership in how we need to redesign our programs to engage and serve fathers (since coming back), and I will also be engaging staff at our largest public hospital around how to engage fathers."*

*"I plan to draft a memo to our new Governor on the positive changes we could make to support fatherhood (child support debt expungement, intentional fatherhood home visiting programming, etc.) and work with fatherhood programs in CA to finalize the requests and mobilize around them."*

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## CONCLUSION

2Gen convenings have the potential to create change for whole systems and the lives of the families they serve. This planning guide is the first step. Having planned and supported more than 100 2Gen convenings, Ascend has cultivated a depth of knowledge for the practical elements and nuanced factors that result in successful convenings. This toolkit considers concrete examples from many 2Gen convenings and illuminates the lessons learned and best practices developed with the aim to at once maximize the impact and minimize any inefficiency in developing and hosting convenings. Our hope is that the toolkit will support 2Gen practitioners, policymakers, researchers, and philanthropists across the country in more effective convening outreach, partnership, and impact. For questions or comments, please contact Ascend at the Aspen Institute at [ascend.info@aspeninstitute.org](mailto:ascend.info@aspeninstitute.org).



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*"Overall, I was just so impressed and inspired by this event. It was positive, critical, realistic and visionary. I left feeling empowered, inspired and also with a tremendous sense of urgency. Very well organized and excellent selection of speakers and attendees. Thank you so much!" – 2Gen convening participant, 2018*

*"This was my first Summit so I took away a wealth of knowledge and an approach to our local work with children and families that I did not have before. I went all the way to DC and somehow met people who are doing amazing work 60 minutes away from me in Florida!"*  
– 2Gen convening participant, 2019

*"Thank you so much for the opportunity to attend. It was a day filled with laughter, inspiration, information and hope. I was very pleased with the topics and the format you used. I am grateful to have shared space in this day and look forward to a continued connection to you!" – 2Gen convening participant, 2018*

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THE ASPEN INSTITUTE

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