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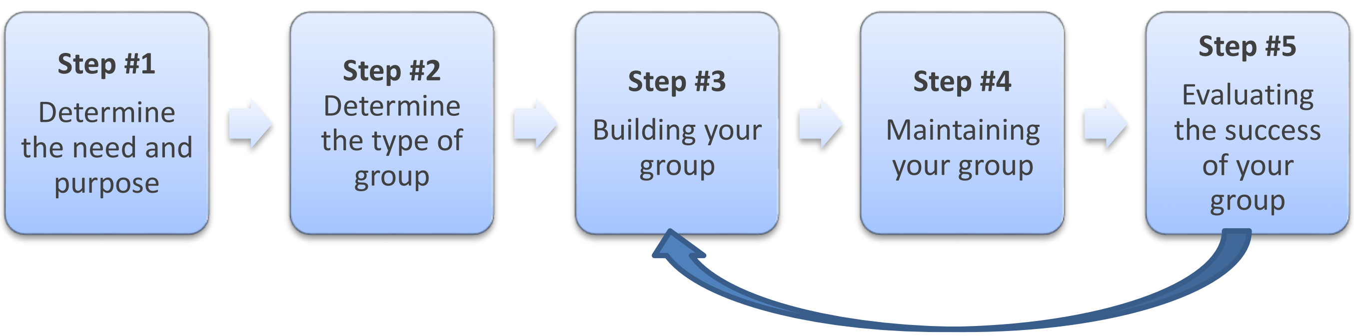
Vibrant Communities

GUIDE | FIVE KEY STEPS FOR BUILDING STRONG AND SUSTAINABLE GROUPS

Research from around the world is clear about the need to collaborate and build partnerships to make sustainable change in our communities. Sounds simple, find people and ask them to sit at the table and plan for action. However, there is more to it than a table, chairs and people. Building a successful group takes time, resources, relationships and trust. In this guide, you will find five steps and associated resources to help build groups that will work together to make change in your community.

For the purpose of this guide, we are going to use the term “group” to represent a variety of collectives - roundtables, coalitions, partnerships, committees, working groups etc. No matter what type of group you are forming, this guide will help you with the foundational steps to building strong and sustainable groups.

BASIC STEPS TO BUILDING A GROUP



STEP 1: DETERMINING THE NEED AND PURPOSE OF THE GROUP

Why Form Groups?

There are many reasons we bring potential partners together to address complex social, environmental and/or economic issues. Bring a group of people together for an issue is the easy part of forming a group. Forming partnerships to sustain the group is the hard part. Partnering is not an easy process and there is no “one size fits all” process that will make it successful. Partnership is about understanding who is at the table, who should be at the table, why they are at the table, what role they play in achieving the collective goals, and deciding on the right type of structure to achieve outcomes. The willingness of partners to come together and determine the core function of the group to achieve common goals will dictate the type of group that is formed.

Some questions to think about before creating your group:

1. What is the problem?
2. What is the common agenda of the group?
3. Why is a partnership needed to accomplish your goal?

Defining the Problem?

- What is the problem?
- Who is most affected by it?
- What is the cause of the problem?
- What factors in the community affect the problem?
- Who has done what to try and resolve the problem?
- What are the costs and impacts of addressing or not addressing the problem?

Source: (Bergeron, Focus On: By-Law Development as a Health Promotion Strategy, 2014)

Forming Your Group

Each organization and individual often has a slightly different definition of the problem and outcome. It is important when pulling a group together to make sure that you all have the same goal that you are working toward. Spending time early on in determining how the mandates of each potential partner intersect with the goal will ensure that everyone has something directly to gain from their participation.

TOOLS

- Assessing Our Community Context - This tool will help guide a conversation to gain greater clarity about the issue or opportunity you are trying to address.
- Top 100 Engagement - This tool will help groups identify and prioritize influential people who could be engaged in your group.

STEP 2: DETERMINING THE TYPE OF GROUP

Having decided that a group is needed to address the problem, there are two things to consider:

a) The type of collaboration that is needed, and
b) The type of working relationship that will be needed.

The word ‘collaboration’ can be interpreted in many ways. Collaboration is also one of the continuums of ways in which people connect. Below is a diagram (Figure 1) that outlines the different approaches. As we move from left to right across the continuum, we increase our potential to accomplish together that which cannot be achieved alone. Each level requires an increase in time, trust and turf-sharing.

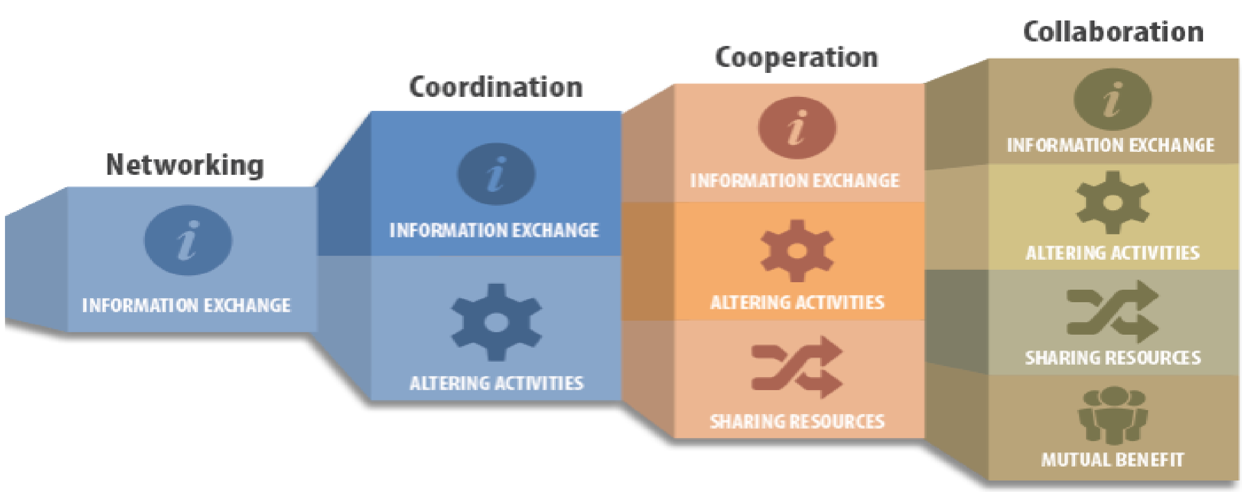
A partnership can be informal or formal across multiple organizations and can be successful no matter how involved or complex. Those who start with sharing resources (e.g. a network) may gradually move to more formal ways of functioning as linkages, relationships and trust are built. According to Butterfoss (2007), there are four types of working relationships that have been identified:

- **Networking:** generally loose-knit exchanging of information for mutual benefit.
- **Coordinating:** exchanging information and altering activities to achieve a common purpose. More formal, long-term and focuses on goals, efforts and programs.
- **Cooperating:** short and informal relationships with no clear mission or structure.
- **Collaborating:** organizations enter into a new structural arrangement with formal roles and full commitment to a common mission. Partners secure and pool resources and share results and rewards.

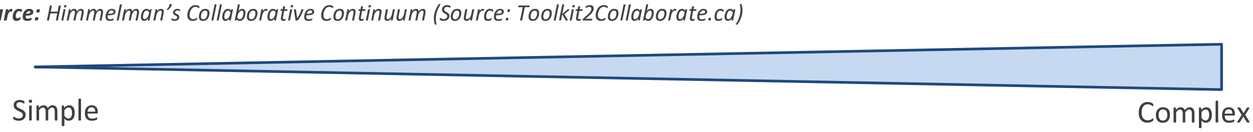
TOOLS

- Collaboration Continuum Key Questions - This tool provides questions that help you to decide what level works best for what you want to achieve.
- Understanding the Collaboration Continuum - This tool explains the levels of collaboration and the capacities and resources that are needed for each level.
- Descriptions of Types of Partnerships - This tool dives deeper into the seven types of groups, their purpose, structure and process.
- Checklist for developing a coalition - This checklist will help you decide if a coalition is the right group to create.

Figure 1: Collaborative Continuum Diagram

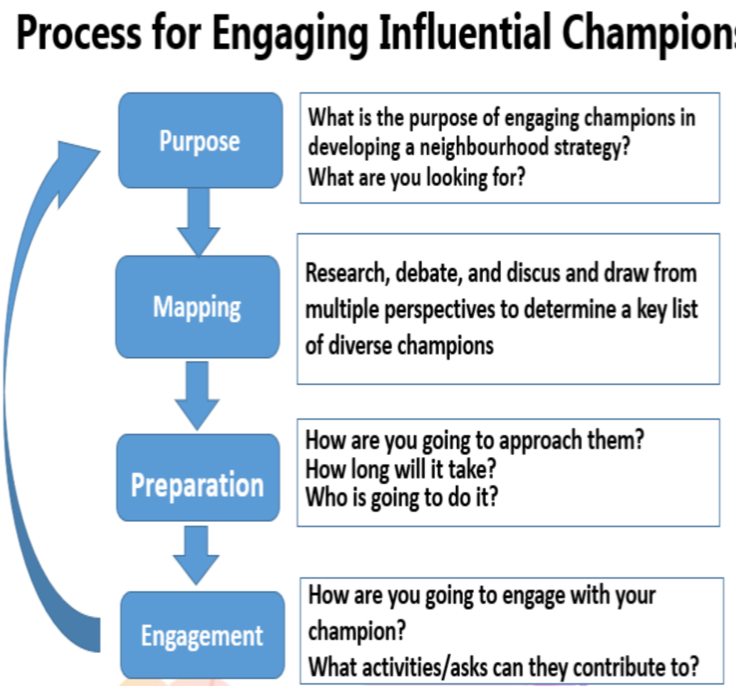


Source: *Himmelman's Collaborative Continuum (Source: Toolkit2Collaborate.ca)*



STEP 3: BUILDING YOUR GROUP

Now that the type, function, and purpose of the group has been determined, you now need to think about the right mix of people for the purpose at hand.



Doing a community scan allows you to talk to residents in the neighbourhood, organizations, and groups to determine the scale of the strategy and if there is support and potential champions. As much as possible, find out about the residents, aspiration, issues and related issues, including any opposition to the issues.

The next step is to understand the level of resident support for the potential neighbourhood strategy and clearly communicate why it is important to have a strategy. You will need to think about different neighbourhood stakeholders, champions or partners whose opinions on the issue are important. To be successful in gaining support you will need to communicate your message effectively. You will need to think about different perspectives and common challenges so that you can frame your communication to each target.

Most of us want to have committed members who will stay until the mission has been achieved because this requires less work and is easy to maintain the membership. However, we know that people have different reasons for participating in a group and we need to plan for and embrace different levels of involvement over time to allow for flexibility so that members do not experience burnout.

A lot of groups consider involving organizations and institutions because they bring resources, commitment and accountability. However, organizations do have restrictions and must stay within their mandate. It is important to include individuals who are not tied to an organization (e.g. students, residents, retirees etc.) who bring expertise, skills and connections that can contribute to the goal of the group but are not bound by mandates.

There has been a strong shift from groups that are solely organizations, to include more people with living/lived experience. In an article called *Components of effective Collective Impact*, Dan Duncan from Clear Impact states, "you need to be authentic when bringing community representatives or persons with lived experience together." Being inclusive and diverse is more than just having a few members sitting at the table to represent the community from which they come from, as this can create a sense of unequal power dynamics.

Having a mix of members will help to keep the group sustainable and strong. When people come together, they bring their skills and capacities and will engage with the group on their own terms. Here are some different ways members will interact with a group:

- **Active members** - Those who are involved in the work, attend meetings plan activities, and are part of planning.

- **Advisor members** - Those who bring credibility to the group, promote the group and provide advice.

- **Informed members** - Those who want to be sent minutes, provide input when asked, but do not want to be involved in the day-to-day.

- **Resource members** - Those who have resources (such as a meeting space) that they are willing to contribute, but do not want to be involved.

Six "R" of Involving and Mobilizing Residents in Groups

1. Recognition - People want to be recognized for their leadership/contribution.
2. Respect - Everyone wants respect. People seek recognition and respect for their values, culture and traditions by joining community groups.
3. Role - Everyone needs to know where and how they can contribute. Finding roles and responsibilities for everyone will help with maintaining involvement.
4. Relationship - Residents sign up for private reasons (to get connected to people, make new friends and to have fun) or for public reasons such as to influence decision makers.
5. Build opportunities for the group to get to know each other and build trust and relationships.
6. Reward - People join groups when the rewards of the membership outweigh the cost. Try and identify everyone's gifts, talents and interests.
7. Results - Groups are motivated by results. Build in evaluation methods, communicate the results and have a mix of long-term goals and quick-win goals. Celebrate even the small wins.

FD Butterfoss (2007)

TOOLS

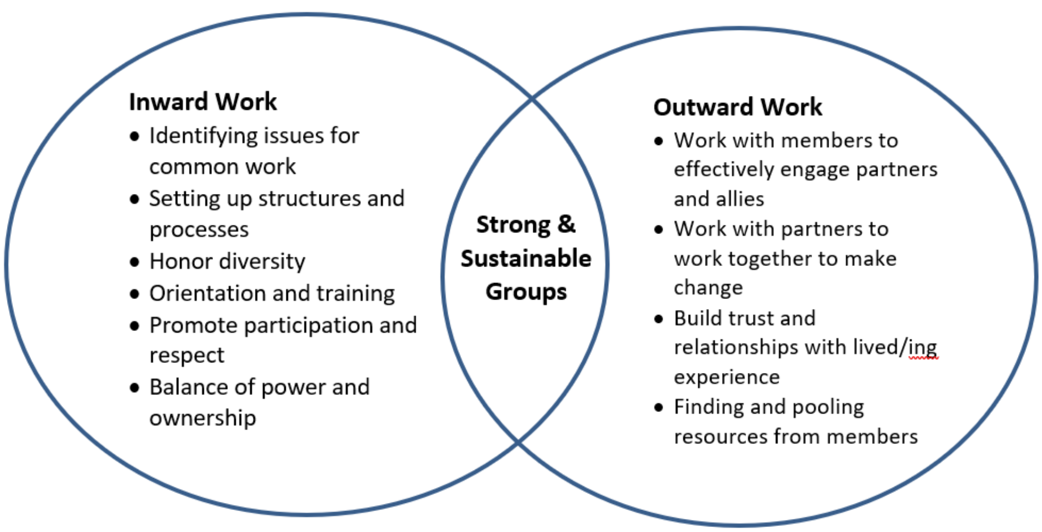
- Guide to Building Your Case - This guide has great sections explaining how to build a case, recruit stakeholders, and form your group.

- Establishing Values and Principles - This four-step tool will help groups create their values and principles document.
- Gives and Gets - This tool will guide each individual of the team to explore and articulate their own personal needs and potential benefits. This ensures that the hopes and needs of each individual team member is heard, understood and integrated into the team’s vision and action plan.
- Stakeholder Wheel - This tool will help guide a conversation with others as to their desired level of involvement in the opportunities and work of your group going forward.
- Barriers to Partnership - There are often barriers to starting a coalition, and it's important to be aware of and anticipate them.
- Turf, Trust, Co-Creation and Collective Impact - We spend so little time and focus on intentionally building trust amongst partners. This paper explores the intricacies of trust, how to build it and what to do when trust is broken.
- The Psychology of Groups - A blog on why people join groups.

STEP 4: MAINTAINING PARTNERSHIPS

A common mistake that groups make is that they focus on the doing and not on maintaining relationships. Maintaining partnerships is really about the relationships and trust.
There are two functions that partnerships need to do no matter what type they are:

Figure 2: Source: FD Butterfoss (2007)



1. **Inward work** are the actions or activities that are needed to build, nurture and maintain the group. This includes building the vision and goals, recruitment, training and retaining members. This is where building relationships and trust fit.

2. **Outward work** are actions that lead to achieving the goals of the group. These will focus on implementing the actions that will lead to the jointly established outcomes. Outward work

effectiveness will depend on the quality of the internal coordination of the coalition and the level of trust developed by the inward work.

Spending time on the development and infrastructure of your group will increase the likelihood that the groups will last. A common challenge for groups is to jump right into the “doing” and not spend time in the beginning to develop structure, trust and relationships with the members. A balance of the two (planning and doing) will be needed to keep everyone engaged. Some of the early ‘doing’ activities might engage populations that help inform the longer-term planning aspect. Here are actions that will help get your group started:

- **Vision and Mission for the Group -** These will help generate support and awareness for the group, understanding of where the group wants to go and why it exists.

- **Determine Core Values and Norms -** Establishing a core set of values and principles for working together can save time over the course of the collaborative. These are especially useful when sticky situations arise, conflict of interest happen and when decisions are being made.

- **Roles and Responsibilities of Members -** This will make sure you have the resources needed to do the work, help reduce conflict, and have accountability for actions.

- **Organizational Structure -** Develop a framework that shows how the group is organized, which is the keystone to keep the coalition functioning. The framework should describe how members are accepted, how leadership is chosen, and how decisions are made.

Key Ingredients to Sustaining your Group

- The group’s vision, mission and objectives
- The basic governance and operating rules of the group
- The group’s leadership and membership
- The roles and responsibility of leaders and members
- The group’s action plans, both short and longer-term
- The group’s actions and results, and celebrating success
- The funding, so that those accomplishments can be continued
- The group’s visibility and support in the larger community
- The spirit of the group, the trust and relationships among all involved, which are a fundamental precondition for the coalition's continued existence.

Source: adapted from the Community Tool Box

- **Develop a Terms of Reference -** This is a document that clearly descries the group’s purpose, structure and operating rules (e.g. how decisions are made and how communication is undertaken). It defines the roles and responsibilities for members. This document is built as a group, easy to understand and changes as the group evolves.

- **Funding/Resources -** Determine what resources the group will need and what is available through the members. Think about the different types of resources: human, financial, in-kind and environmental.

- **Relationship Building -** When new people join the group once it has been established there needs to be time invested in onboarding them. Make sure to go over the terms of reference and the structure and understand their gives and gets.

Now that you have a group gathered, you will need to think about how to maintain the momentum and membership. What needs to be maintained are the key structures, functions, and relationships of the group. For most groups, the key ingredients are social rather than physical, but they are no less real or important. Developing a retention plan will help to make sure the group is functioning well, will achieve results and increase sustainability of the group.

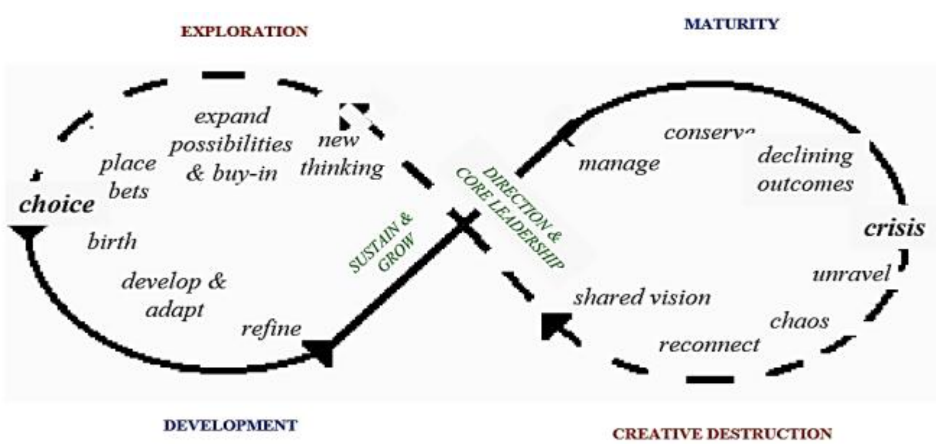
TOOLS

- How to Develop a Maintenance Plan
- Health Nexus - six activities for successful partnerships
- Partnership Brokering - principles, strategies and ideas to building partnerships
- RACI - this tool helps with project management
- Terms of Reference Sample
- Sample Agenda

STEP 5: EVALUATING YOUR PARTNERSHIP

Many groups do not take the time to evaluate the effectiveness of the functions and structure of the group. Most evaluations tend to be focused on the programs and activities that are being implemented by the group. Taking time to evaluate the health of your group's process will lead to stronger and more sustainable relationships and structures that are able to effectively support the collective goal. Here is Tamarack's "eco-cycle" of a typical group process that takes a group from development into maturity. Regular opportunities for learning and reflection need to be intentionally included into every phase of the change effort and deliberate thought and planning needs to be devoted to succession, renewal and sustainability.

Figure 3: The Phases of Community Change Eco-Cycle



Your evaluation efforts should differ based on where in this cycle your group is. For example, focusing on outcomes and accomplishments is likely not necessary during the Development phase. Just as the activities of any collective require resources, so does the evaluation. However, the reality is that evaluation is often an after-thought and is not usually well-resourced. The World Health Organization recommends 10% of the total budget for an initiative be allocated towards evaluation.

There are four types of evaluation that are applicable to the work of a partnership.

Formative -This is the evaluation of the activities that occur during the formation, implementation and maintenance of the group. This covers community assessment, pre-planning, phases of coalition and its work.

Process - This is about measurements obtained during the implementation of program activities. This is the documentation of daily activities that take place within and outside the group that determine how well things are going i.e. budget, meetings, media coverage.

Outcomes - This is about the ultimate goal of the group. These long -term outcomes include increased capacity and competence, and organizational empowerment.

Summative - This refers to the evaluation of the impacts and outcome of the coalition. In the practical sense, both the formative and summative evaluation allows for the need to evaluate before, while and after the coalition starts any internal changes or community programs.

This chart is a great summary of the evaluation types and examples:

LOGIC MODEL COMPONENT	Recruit Members	Inputs, Activities, Outputs	Outcomes	Everything
TYPE OF EVALUATION	**Formative** (e.g. needs assessment)	**Process** (e.g. monitoring participation, reach, satisfaction)	**Outcome** (e.g., changes to which the partnership contributed)	**Summative** (e.g. case Study integrating all evaluation data gained)

Depending on how involved you want to get in evaluating your partnership, it may be helpful to develop a logic model that describes your approach. A logic model is a graphic depiction (roadmap) that presents the shared relationships among the resources, activities, outputs, outcomes, and impact for your program. It depicts the relationship between your program's activities and its intended effects.

It may not be useful or necessary to undertake all four types of evaluation. To help narrow your focus, set your priority Research Question(s). Develop a list of possible questions that focus on how to improve the partnership (process) and/or what outcomes you want to measure. Then rank the questions and narrow them down, based on:

- The questions that are most important to you and your key stakeholders (the "must answer" questions).
- Questions that provide results that you can use (e.g., for improvement).
- Questions you can answer fully with available data.
- Questions within your resources to answer[1]

TOOLS

- Eco-Cycle Mapping Tool - Community change efforts are dynamic and typically unfold according to four phases.
- Kellogg Logic Model Development Guide - Non-profits today are being pressed to demonstrate the effectiveness of their program activities by initiating and completing outcome-oriented evaluation of projects. This guide was developed to provide practical assistance to nonprofits engaged in this process.
- Self-Evaluation Tool for Action in Partnership - This is a sample survey that allows participants to identify their perceptions and opinions of their experience participating in the group.
- Tool to Evaluate Your Coalition - This series looks at how to develop coalitions, what to do when coalitions have been established and how to evaluate a mature coalition.
- Example of a Coalition Survey - This is a sample survey that is used to evaluate coalition members.
- Should You Disband Your Group? - This is a great document that has questions about your group and helps you determine if you should keep going or disband.
- Evaluation Guide: Fundamentals of Evaluating Partnerships - This very thorough guide includes templates and examples for developing an Evaluation Plan.

Increase The Success Of Your Evaluation

You can take several steps to increase the success of your partnership evaluation:

- Establish an evaluation plan during your partnership planning.
- Start small. Be creative and flexible.
- Engage partners and staff in the evaluation process.
- Allow staff time and allocate resources for evaluation.
- Match evaluation methods to evaluation questions.
- Use and adapt existing tools.
- Report results clearly and often.
- Be sensitive to partners' time and needs.

Source: Fundamentals of Evaluating Partnerships – p. 16

KEY TAKEAWAYS

Building groups help bring people together to focus on an issue or problem that cannot be solved by a single person or agency. Working as a group helps to expand resources, reach, ideas and capacities to make a change. There are five main steps to developing a group and when they are followed the chances of sustaining the efforts and maintaining memberships will be stronger. Here are some key takeaways that you may find helpful in building and sustaining your group:

[1] Fundamentals of Evaluating Partnerships. https://www.cdc.gov/dhdsp/docs/partnership_guide.pdf Centers for Disease Control and Prevention. Evaluation Guide: Fundamentals of Evaluating Partnerships. Atlanta: U.S. Department of Health and Human Services; 2008. This very thorough guide includes templates and examples for developing an Evaluation Plan. P. 9

- **Members are at the heart of success for groups.** Members need to be trusted, fulfilled, learn and gain new skills to keep them motivated to attend.
- **A dedicated leader or leading agency is needed to run the meetings.** The lead has the ability to build trust, keep momentum, sustain and grow the group.
- **It takes time.** A big mistake that groups do is jump right into the 'doing' without taking the time to build the foundations of the group (i.e. how to function, terms of reference, guiding principles, and communication strategy).
- **Meetings need to have a purpose.** Agendas are so important in meetings. They help meetings to stay on track and help members to know what is needed from them.
- **Remember the direction.** Make sure that everyone is reminded of the vision and goals so that the group stays on track.
- **Provide space for members to contribute.** Doing an inventory of the gifts and skills of members and utilizing them in the work will help to keep members motivated.
- **Project sustainability** needs to be part of the project from the very beginning.
- **Communication is important.** Communicating between meetings and also to those who do not attend meetings will help everyone to stay engaged.

RESOURCES

- Butterfoss, F. D. (2007). Coalitions and Partnerships in Community Health. San Francisco, CA: Jossey-Bass; John Wiley & Sons
- CoalitionsWork
- Community Toolbox
- Fundamentals of Evaluating Partnerships
- Iowa State University's Extension and Outreach - Tools to Evaluate Your Coalition
- Measure Partnership Effectiveness, a resource of HC Link
- Supporting Partnerships by Health Nexus

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