Gratitude & Acknowledgement

We invite you to share your location

We begin this workshop by acknowledging that we are meeting on Indigenous land. As settlers, we are grateful for the opportunity to meet, and we thank all the generations of Indigenous peoples who have taken care of this land.

As settlers, this recognition of the contributions and historic importance of Indigenous peoples must be clearly and overtly connected to our collective commitment to make the promise and the challenge of Truth and Reconciliation real in our communities.

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The Tamarack Team

Liz Weaver

Natasha Pei

Trisha Islam

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Our Commitment To Learners

1. To bring **new** and **relevant thinking** & **approaches** to community changemakers

2. To **co-generate knowledge –** creating opportunities for you to engage with peers and share your amazing work

3. To **share tools** and **frameworks** to move you from ideas to impact using fun, interactive exercises.

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In the Tamarack **Learning Centre** we support our learners in the **five interconnected practices** that we believe lead to impactful **community change**.

Evaluating Impact

Collective Impact

Community Innovation

COMMUNITY CHANGE

Community Engagement

Collaborative Leadership

REDUCING POVERTY
DEEPENING COMMUNITY
BUILDING YOUTH FUTURES
CLIMATE TRANSITIONS

Vibrant Communities
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In **Vibrant Communities**, we support **cities and local leaders** to implement large-scale change initiatives to **reduce poverty, deepen community, build youth futures** and **address climate transitions**.

Navigating Workshop Technology

- This session will not be recorded
- Keep you webcams on if you are comfortable
- Keep your microphones muted unless you have a question or comment – questions and comments are welcome throughout the workshop
- We encourage you to use the chat box feature throughout the workshop to also share your thoughts, questions and comments
- We will be sending you into small breakout rooms (zoom rooms) at different times during the workshop – these breakout rooms will be self-facilitated
- We will be using MURAL, an online whiteboard software, at different times during the workshop, we will orient you to the software prior to an exercise
- Reach out to Trisha or Natasha at any time during the workshop for technical assistance or support
- If you must leave the session or get bumped out for any reason, Natasha will let you back in from the waiting room

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Small Group Facilitation Tips

- Introduce yourselves to each other
- Your group will be together throughout the workshop
- Identify someone who is willing to facilitate
- Identify someone who is willing to report out
- Create a welcoming environment, listen intently and avoid negative comments
- Make sure that everyone in the group is clear about the task
- Welcome participation from everyone - Engage in supportive behaviours
- Have fun and learn from different perspectives
- Thank everyone for their participation

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Collaborative Governance and Leadership Workshop Series

|		
Session 1: Investing in Leadership that Makes a Difference September 22, 2021 2:00 – 4:00 pm ET	Session 2: Governance Roles and Structures September 29, 2021 2:00 – 4:00 pm ET	Session 3: Navigating Collaborative Governance from Start Up to Sustainability October 6, 2021 2:00 – 4:00 pm ET
Session 4: Evaluating Collaborative Leadership Experiences October 13, 2021 2:00 – 4:00 pm ET	Session 5: Building a Collaborative Governance Action Plan October 27, 2021 2:00 – 4:00 pm	Coaching and Technical Support available throughout and one month post workshop November 10, 2021 Time to be arranged

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Today's Agenda

Pre-Workshop	Workshop | Session 3 Navigating Collaboration from Start Up to Sustainability
• Access and review the Collaborative Governance web page of resources	• Welcome to the Workshop • Making Connections and Homework • The Phases of Collaboration • Planning for Sustainability • Open Forum • Your next steps

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The stinky fish is a metaphor for "that thing that you carry around but don't like to talk about; but the longer you hide it, the stinkier it gets."
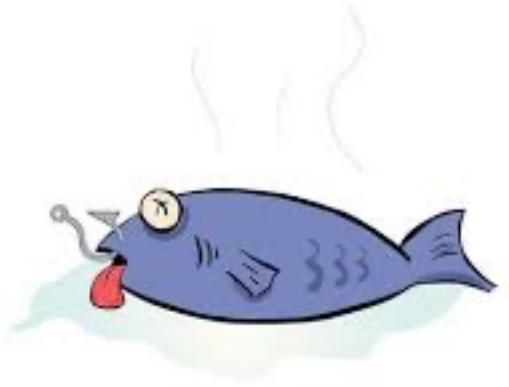
What is your fear or anxiety around collaborative governance? E.g.

- Creating trust (e.g. virtually)
- Having vulnerable conversations
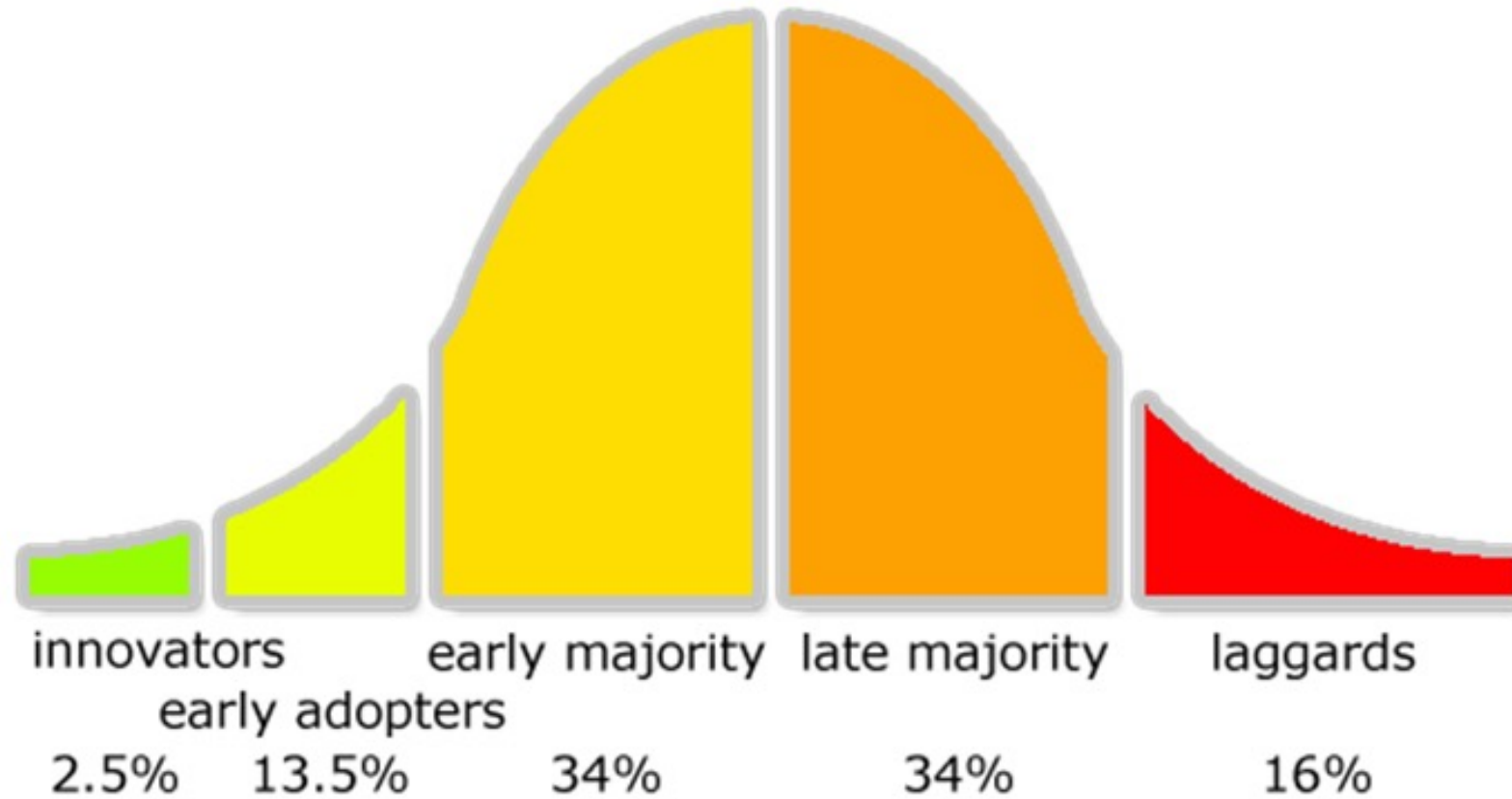- Your collaborative governance structure

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Reflection and Homework

Accountability Matrix – What did you learn?

	Primary Focus & Contributions	Accountability
Convener/ Fiscal Sponsor		
Leadership Table		
Staff Resources		
Working Groups or Action Teams		
Community Network or Community Eco-System		

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innovators   early majority   late majority   laggards
early adopters
2.5%   13.5%   34%   34%   16%

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The Core Roles of Backbone Staff

- Convener / Facilitator of the Community Change Effort
- Supports the strategic direction of the leadership table
- Engages the leadership table members to align their organizations with the common agenda or shared vision
- Engages working group members and community partners to align their work with the common agenda and shared vision
- Does not do the work but Enables the change work to happen

- Always asks these questions:
  - **How will this opportunity/challenge move us closer to the shared vision** and help us achieve our goals?
  - If the opportunity/challenge is not aligned, who else in the community could be taking this on?
  - If the opportunity/challenge is aligned, who in the current network might be best positioned to take the lead on this opportunity/challenge?

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The Phases of Collective Impact

The Phases of Collective Impact

Components for Success	Phase I Assess Readiness	Phase II Initiate Action	Phase III Organize for Impact	Phase IV Begin Implementation	Phase V Sustain Action and Impact
Governance and infrastructure	Convene community leaders	Identify champions and form cross-sector Steering Committee "SC" to guide the effort	Determine initial workgroups and plan backbone organization	Launch work groups "WGs" and select backbone organization	Building out the backbone organization; evolve WGs to meet emergent strategy
Strategic planning	Hold dialogue about issue, community context, and available resources	Map the landscape and use data to make case	Create common agenda, clear problem definition, population level goal	Develop Blueprint for Implementation; identify quick wins	Refine strategies; mobilize for quick wins
Community engagement	Determine community readiness; Create a community engagement plan	Begin outreach to community leaders	Incorporate community voice - gain community perspective and input around issue	Engage community more broadly and build public will	Continue engagement and conduct advocacy
Evaluation and improvement	Determine if there is consensus/urgency to move forward	Analyze baseline data to ID key issues and gaps	Develop high level shared metrics and/or strategies at SC level	Establish shared measures (indicators and approach) at SC and WG levels	Collect, track, and report progress (process to learn and improve)

Diving into the Components for Success

Defining the Components for Success			
Governance and Infrastructure			
Description:	This component is focused on ensuring that your group shares responsibilities and leadership; and, is clear about how – and who – makes decisions. The aim, when possible should strive for a consensus that is honoring of multiple perspectives.	Questions to consider:	"Who are we? & How do we work together?" The focus of work for this element involves continually assessing: • What are the minimum agreements needed for us to work well together? • What practices do we have to help us foster understanding and trust between us? (When disagreements arise, how do we address them constructively?) • What structures are needed to enable us to work together well?
Goal:	To agree upon how your initiative is best designed and led	Indicators of Success:	• There is clarity around how we work together; • We have established adequate structures to support us in our work; and, • We have established a high degree of trust throughout our initiative • We have determined a set of values and principles that guide our collective work

Diving into the Components for Success

Defining the Components for Success			
Strategic Planning			
Description:	This component is focused on ensuring that your group is clear about what we are trying to accomplish together and how.	Questions to consider:	• What is your group's aspiration? • What can we accomplish together to change the circumstances for individuals impacted by this issue or problem? • What are the key actions that must be taken to realize your aspiration?
Goal:	To establish an action plan that outlines how – and who – will do what to realize your common agenda.	Indicators of Success:	• There is broad understanding and endorsement of your plan; • Regular and consistent progress is being seen and interest and involvement are growing; and • The plan is regularly updated and refined using data and learning from the group's actions.

Diving into the Components for Success

Defining the Components for Success			
Community Involvement			
Description:	This component is focused on ensuring that your group has engaged diverse perspectives to view your issue holistically.	Questions to consider:	The focus of work for this element involves continually assessing: • Who have you involved? • Who else needs to be involved on this issue?
Goal:	To ensure you understand your community's unique context; and, engage others to work with you to address it	Indicators of Success:	Indicators of Success for this element: • There is shared ownership of an issue; and • There is consensus on common agenda and sustain shared action to make it a reality

Diving into the Components for Success

Defining the Components for Success			
Evaluation and Improvement			
Description:	This component is focused on ensuring that your group has engaged tracking progress and using the data/information to adjust and/or make changes accordingly.	Questions to consider:	The work of this element is focused on answering the questions: • What is changing and are we learning? • How are we changing policies, culture, norms and systems? • What impact are we having?
Goal:	To assess progress, outcomes and impact; and, to document and share learning	Indicators of Success:	Indicators of Success for this element: • Learning is captured; used to refine action; and, documented and shared • Evidence of progress and impact is measured and communicated

CI Phases Self Assessment Tool

The Phases of Collective Impact

Over-arching Actions	Components of Success	Phase I *Generate Ideas and Host Dialogues*	Phase II *Initiate Action*	Phase III *Organize for Impact*	Phase IV *Begin Implementation*	Phase IV *Review and Renew*
		Pre start-up *Focus: Engagement and Exploration*	Start up *Focus: From Idea to Formation*	Growth *Focus: Early Experimentation*	Growth *Focus: Scaling efforts*	Maturity *Focus: Sustain and Renew*
		EARLY YEARS Key Question: *What needs to happen?*		MIDDLE YEARS Key Question: *How well is it working?*		LATER YEARS Key Question: *What difference are we making?*
		KEY ELEMENTS				
Design, Implement and Lead your CI Initiative	**Governance and Infrastructure** How decisions are made and responsibilities shared	Convene Community Stakeholders	Identify champions and form cross-sector Steering Committee (SC) to guide the effort	Develop infrastructure (backbone, leadership team, and working groups)	Launch work groups and formalize backbone infrastructure	Facilitate, refine and renew
	Strategic Planning What are we trying to do and how: Our Theory of Change	Hold dialogue about issue, community context and available resources	Map the landscape and use data to make the case	Create common agenda, clear problem definition, agreement on population level goals	Develop blueprint for implementation and identify quick wins	Refine strategies to mobilize for quick wins and to review progress
Understand Context	**Community Involvement** Who is involved? Who else's eyes need to be on this issue?	Determine community readiness; create a community engagement plan	Begin outreach to community leaders	Incorporate community voice, gain community perspective and input around issue	Engage community more broadly and build public will	Continue engagement and address policy change needs
Assess Progress, Outcomes, Impact and Learning	**Evaluation and Improvement** What are we learning and how are we changing culture, norms and systems?	Determine if there is consensus and urgency to move forward	Analyze baseline data to identify key issues and gaps	Establish shared metrics (indicators, measurement and approach)	Establish shared measures (indicators and approach at SC and WG levels)	Collect, track, and report progress (process to learn, improve, and renew)

- Describes each of the phases of collective impact

- Identifies essential deliverables within the areas of governance, planning, community engagement and evaluation and improvement

- Allows for individual and group reflection

- Is a living tool

Dancing Across the Phases

The Phases of Collective Impact

Over-arching Actions	Components of Success	Phase I *Generate Ideas and Host Dialogues*	Phase II *Initiate Action*	Phase III *Organize for Impact*	Phase IV *Begin Implementation*	Phase IV *Review and Renew*
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- Not every collective impact is linear, many have elements across a number of the phases

- The four elements – governance, planning, community engagement and evaluation – are critical across all the phases

- The tool can be useful for assessment, reflections and planning

The Start Up Phase – How to Onboard Effectively

1. Build an orientation package for new members including the six governance documents identified in last session
2. Develop an orientation or onboarding plan with timelines
3. Have a meeting with the new member to review the package and plan
4. Recruit a buddy for the new member to connect with during the first few months
5. Check in with the new member once a month to ensure connection

6. Other suggestions you might have?

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The Start Up Phase – How to Onboard Effectively

Six Key Collaborative Governance Documents

1. Governance Structure – Describes the governance structure, roles and accountabilities.

2. Principles for Working Together –Defines the core principles guiding the collaborative.

3. Decision Making Strategy – Defines how decisions will be made at different levels.

4. Plan on a Page – A synthesis of the core aspiration / common vision of the collaborative and details about the approach.

5. Key Milestone Report – A living document reflecting the purpose and key decisions taken by the collaborative.

6. Regular or Annual Progress Update – An annual progress report which includes reflection, sense-making and learning.

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The Phases of Collective Impact – Self Assessment

Interactive Small Group Session

The Phases of Collective Impact

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		Pre start-up *Focus: Engagement and Exploration*	Start up *Focus: From Idea to Formation*	Growth *Focus: Early Experimentation*	Growth *Focus: Scaling efforts*	Maturity *Focus: Sustain and Renew*
		EARLY YEARS Key Question: *What needs to happen?*		MIDDLE YEARS Key Question: *How well is it working?*		LATER YEARS Key Question: *What difference are we making?*
		KEY ELEMENTS				
Design, Implement and Lead your CI Initiative	**Governance and Infrastructure** How decisions are made and responsibilities shared	Convene Community Stakeholders	Identify champions and form cross-sector Steering Committee (SC) to guide the effort	Develop infrastructure (backbone, leadership team, and working groups)	Launch work groups and formalize backbone infrastructure	Facilitate, refine and renew
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Assess Progress, Outcomes, Impact and Learning	**Evaluation and Improvement** What are we learning and how are we changing culture, norms and systems?	Determine if there is consensus and urgency to move forward	Analyze baseline data to identify key issues and gaps	Establish shared metrics (indicators, measurement and approach)	Establish shared measures (indicators and approach at SC and WG levels)	Collect, track, and report progress (process to learn, improve, and renew)

- Review the Phases of Collective Impact Self-Assessment Tool
- Focus on a phase that your collaborative is currently in or a component of success
- Review that section
- Reflect with your team

- 20 minute conversation

Planning for Sustainability

Creating Sustainable Approaches

Collective Impact Conditions	
Pre- Conditions	Conditions
Influential Champions Urgency of Issue Adequate Resources	Common Agenda Shared Measurement Mutually Reinforcing Activities Continuous Communications Backbone Infrastructure

Collaborative Resilience and Collaborative Sustainability

- Community resilience is a process linking a set of networked adaptive capacities to a positive trajectory of functioning and adaptation after an initial disturbance.

- The ability of a community to bounce back and utilize physical and economic resources effectively.

Collaborative Resilience and Collaborative Sustainability

Levels and Scales

- Spatial scales – landscapes, regions, the globe
- Temporal scales – daily, seasonal, annual, generational
- Jurisdictional scales – localities, state, national, international
- Institutional scales – operating rules, laws and regulations
- Managerial scales – tasks, projects, strategies
- Scales of human networks – family, kin, society, trans-society
- Scales of knowledge – practice-based, local knowledge, generalized science

Collaborative Resilience and Collaborative Sustainability

Building Adaptive Capacity

- Anticipation – predictive and ability to calculate potential impact

- Vulnerability – state of system susceptibility to harm

- Trust – focus on building trust across networked systems

Collaborative Resilience and Collaborative Sustainability

Building Collaborative Resilience

- Diversity of partners – provide a range of perspectives and insights

- Diversity of knowledge – useful in addressing complex system problems

- Diversity of Institutions – useful for leveraging strengths

- Mitigating vulnerabilities – examining a range of risks

- Role of social capital – builds connections to assess and mitigate vulnerabilities

- Experimentation and learning – includes rapid prototyping and sense-making

- Governance and capacity building – interactions and agreements between many actors

Collaborative Sustainability

Sustain (verb)

1. **to support, hold, or bear up from below; bear the weight of, as a structure.**

2. to bear (a burden, charge, etc.).

3. to undergo, experience, or suffer (injury, loss, etc.); endure with out giving way or yielding.

4. to keep (a person, the mind, the spirits, etc.) from giving way, as under trial or affliction.

5. **to keep up or keep going, as an action or process:** *to sustain a conversation.*

6. to supply with food, drink, and other necessities of life.

7. **to provide for (an institution or the like) by furnishing means o r funds.**

Common elements of sustainable success

For sustainability to become a reality, collaborations need:

- Buy-in and support from key decision-makers as well as community volunteers.
- Sufficient leadership, funding, and channels of communications.
- Procedures in place to monitor policy results through enforcement and compliance, and to modify strategies accordingly.
- Create a long-term plan for ensuring the viability of the coalition or initiative.
- Develop a diverse funding portfolio, collaborative leadership, and marketing/branding strategies.
- Ensure that all community stakeholders are ready to respond to a changing environment.

8 Factors for sustainable success

The First Four Factors

Factor 1: Leadership Competence	Factor 2: Effective Collaboration
Activities that contribute to high quality initiatives are the responsibility of leaders and include: clearly developing and articulating a common vision and objectives; performing regular community needs and assets assessments; ongoing planning, adaptation of approach and evaluation; securing funding, fiscal management and building a sustainability approach.	Involves identifying relevant stakeholders who actively support the collective impact common agenda and strategies and have clearly identified roles and responsibilities. Collaborative efforts build a broad base of support in the community and of key stakeholders for success.
Factor 3: Understanding the Community	**Factor 4: Demonstrating Results**
Entails having knowledge of community needs and resources; having respect for community members in the effort. This includes understanding the socio-economic, political and equity considerations; community participation in all aspects of the initiative honoring community values and cultural relevance, cultivating key community leader support.	Evaluating process and outcomes using acceptable research methods and informing stakeholders of the results and building learning and sense-making into the design of evaluation is critical. Evaluation must assess the intervention and subsequent modifications focusing on measurable results. Evaluative findings can be used to leverage current success and future trends.

The Second Four Factors

Factor 5: Strategic Funding	Factor 6: Staff Leadership
Includes having plans and resources in place to support current and prospective requirements, intentional planning for combined funding includes an analysis of short term funding needs, developing a range of financing options and recognizing that sustainability is enhances when there is diversity in funding streams.	Inclusive of committed, qualified staff in design, implementation, evaluation and decision making; develops a culture that values broad-based participation in working toward program sustainability and success.
Factor 7: Community Responsivity	Factor 8: Learning and Innovation
The ability of the initiative to adapt programming to meet changes in community needs is critical. Although initiatives maintain their overall goals, activities may change to address evolving issues and contexts and includes the ability of the initiative to be modified to meet changing community needs and resources.	Building in a culture of learning and continuous improvement enables the initiative to evolve over time. Innovative practices leverage learning.

Sustainability Self Assessment Tool - Mural

- What factors resonate with you?

- Are there other factors to consider?

Factor 1: Leadership Competence	Factor 5: Strategic Funding
Factor 2: Effective Collaboration	Factor 6: Staff Leadership
Factor 3: Understanding the Community	Factor 7: Community Responsivity
Factor 4: Demonstrating Results	Factor 8: Learning and Innovation

Builds on the Sustainability Factors and includes a self-assessment tool

Open Forum

Getting Ready for Session 4

Collaborative Governance and Leadership Workshop Series

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September 22, 2021

2:00 – 4:00 pm ET | Session 2: Governance Roles and Structures

September 29, 2021

2:00 – 4:00 pm ET | Session 3: Navigating Collaborative Governance from Start Up to Sustainability

October 6, 2021

2:00 – 4:00 pm ET |
|---|---|---|
| Session 4: Evaluating Collaborative Leadership Experiences

October 13, 2021

2:00 – 4:00 pm ET | Session 5: Building a Collaborative Governance Action Plan

October 27, 2021

2:00 – 4:00 pm | Coaching and Technical Support available throughout and one month post workshop

November 10, 2021

Time to be arranged |

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Reflection and Homework

Review and Complete the Sustainability Self-Assessment Tool

Reflection Questions
- What did the Sustainability Self-Assessment Tool reveal for your collaborative?
- What are your strengths as a collaborative?
- What do you have to work on further?

THANK YOU

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