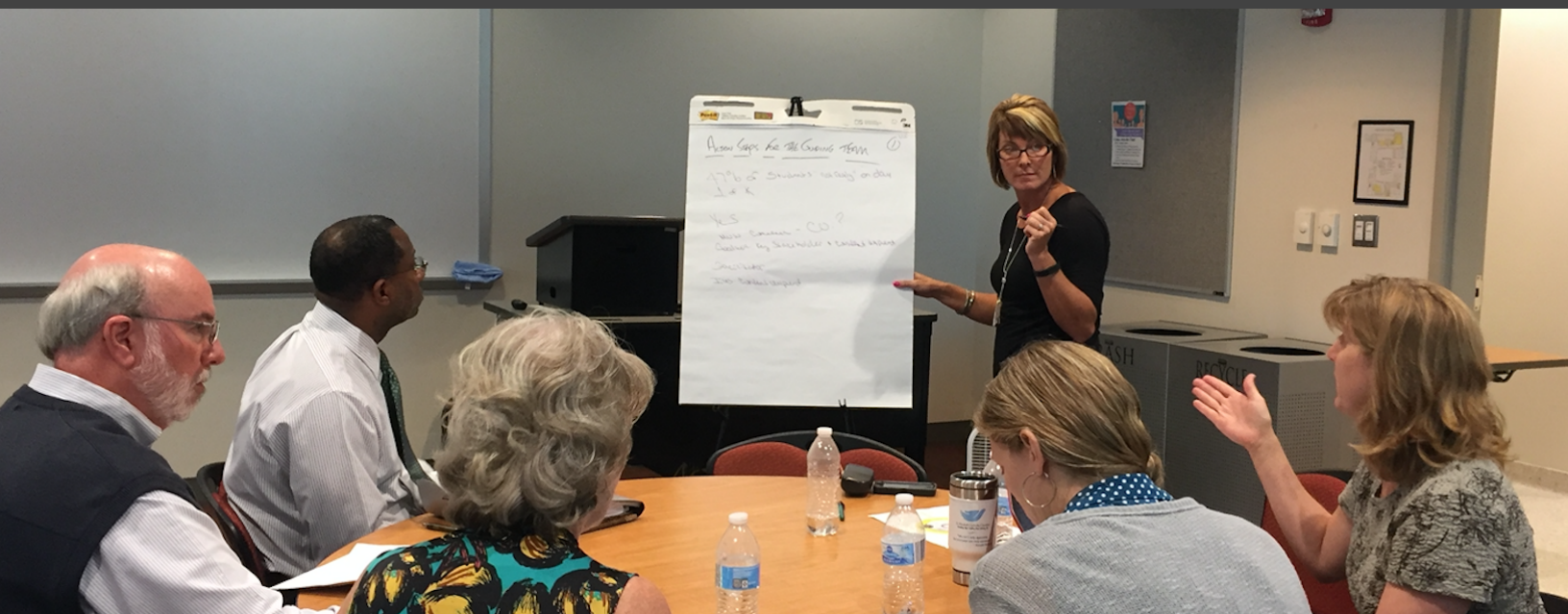


COLLECTIVE LEADERSHIP

Building an Effective Guiding Team

Understanding the key roles and responsibilities of a guiding team



INSTITUTE FOR
COALITION BUILDING

**A GUIDING TEAM:
COLLECTIVE LEADERSHIP**

**A GUIDING TEAM
WORKS ON THE
EFFECTIVENESS
OF THE WHOLE**

Working at a systems level requires the collective leadership support of a guiding team. A guiding team is a small group that works on developing the relatedness of the whole toward the essential purpose of the system; it seeks effectiveness. Its aim is to shape and improve the relationships among the people, programs, and organizations to achieve the aim of the whole system. The team acts as the glue for collaboration, serving and supporting the collective work. Rather than working vertically within organizations, a guiding team works horizontally across programs, organizations, bureaucratic silos, and even the sectors of society. Working in this way requires the creation of a new set of leadership capabilities and capacities; skills which are uncommon in practice and not often taught.

Like a pit crew for collaboration, guiding teams learn how to work together through clearly defined roles, a process for engagement, and a collaborative structure that creates the mutually reinforcing actions necessary to redesign complex social systems. Guiding teams are coordinated by design.

The Key Roles of a Guiding Team:

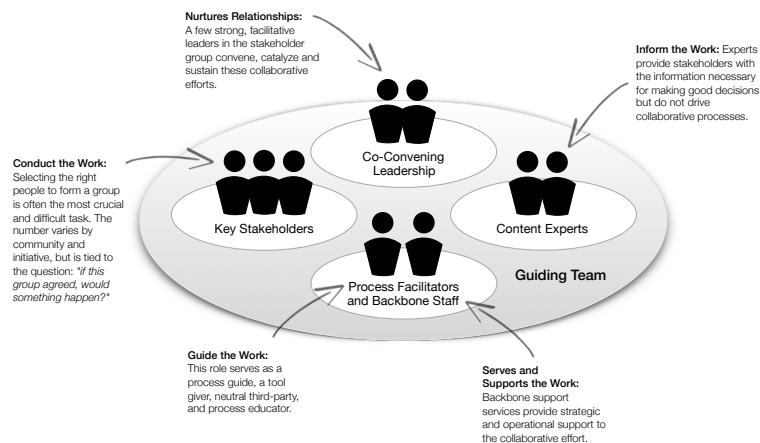
The stakeholder engagement process is built around the idea of shared responsibility—the idea that the success of a meeting should be shared among all participants, and that the necessary functions and roles should be differentiated and not all put in the hands of a single person.

There are five key roles of a guiding team: convening leadership, key stakeholders, content experts, process facilitators, and backbone support. In the systems-building process, facilitative leaders convene and sustain the work, stakeholders do the work, content experts inform the work, process facilitators guide the work, and backbone support staff serve and support the work. The roles are as follows:

- **Convening Leadership:** Strong, convening leaders come from the community and share a vital concern for the issues at hand. No one from outside the community can play this role. These collaborative leaders promote and safeguard the process by keeping stakeholders at the table through periods of frustration and skepticism, acknowledging small successes along the way, helping stakeholders negotiate difficult points, and enforcing group norms and ground rules. The primary role of convening leadership is to ensure the principles upon which the meetings are based are protected and upheld. Convening leaders: 1) provide the glue that holds the collaborative effort together, 2) create and support an inclusive and constructive process, 3) convince others that collaboration is necessary, 4) help do the initiating work, 5) convene the stakeholders, 6) keep the group focused and engaged, and 7) link stakeholders with formal decision-making organizations. At times, convening leaders have strong opinions about the issues, but trust the collaborative process to reach appropriate conclusions.
- **Key Stakeholders:** A stakeholder is an individual or organization who can affect or is affected by the achievement of the collaborative's work. Stakeholders conduct the work closest to the customer. They are the ones who must change their behavior to create effective solutions. Stakeholders are a constituency for change reflecting the perspectives, experiences, and concerns of the broader

community. Note the use of the word 'reflecting' rather than 'representing.' The idea that certain people represent others has the potential to undermine collaboration.

- **Content Experts:** In a collaborative effort, content experts support the learning of the group by providing background information and education needed to understand the issue, describing pertinent lessons of experience, and surfacing critical considerations for decision making. The stakeholder group evaluates the usefulness of the information and decides how to use it. This information becomes part of a learning process, not a fixed idea or position.
- **Process Facilitators:** A facilitator serves as a process guide, a tool giver, neutral third-party, and process educator. A good facilitator helps the group learn together by creating a safe space for constructive engagement and ensuring that participants have equal voice. A strong facilitator teaches skills for collaboration and consensus building while managing any inherent conflict. Many times, facilitators help the guiding team design the process and its component work sessions. The facilitator gains the trust of the group by encouraging the process while remaining neutral, yet guiding, about the content of the current issues. Neutrality about content, however, does not mean ignorance. Content knowledge helps process experts recognize strategic moments in the engagement where skillful facilitation can lead to deeper understanding and agreement.
- **Backbone Support Staff:** Large-scale collaboration requires the creation of a new set of management organizations that have the skills and resources to assemble and coordinate the collective work of redesigning a complex social system. Backbone support staff provide strategic, operational, and project management support to the collaborative effort.



A guiding team works to optimize the system by improving stakeholder relationships

The Responsibilities of a Guiding Team

The highest-level responsibilities of a guiding team are to: 1) focus on the system, 2) redesign the system by transforming relationships, 3) create and sustain the conditions and processes through which stakeholders can learn and co-create solutions together, and 4) lead by operating in service, rather than in control.

Specific guiding team activities include:

- Keeping the collective work focused at systems level by defining, scoping, and identifying the essential purpose of the system
- Identifying and engaging stakeholders who shape the system
- Co-designing a collaborative process of engagement for the group
- Developing a process timeline and agendas for specific meetings
- Serving and supporting the work of the stakeholder group
- Synthesizing the work of the stakeholders from each large group meeting and bringing the insights and learning back to the group
- Determining the information needs of stakeholders, collecting the data, and coordinating the work of content experts
- Overseeing the recording and communication of information and agreements within the stakeholder group
- Tracking group dynamics and issues and determining how to deal with them
- Forming project teams, when appropriate, and facilitating the format of guiding teams for each project
- Evaluating the progress of the initiative and finding ways to improve it
- Planning and initiating outreach activities to the community, formal decision-making bodies, and implementing organizations
- Working with the media to communicate the work and progress of the group
- Working alongside employees of the supporting organization to ensure work is being accomplished
- Tracking financial aspects of the process

DESIGNING A PROCESS OF ENGAGEMENT

Once a guiding team has been formed and the initial key roles have been assigned, the group's first responsibility is to co-design a collaborative process of engagement. It's this stakeholder engagement process that is ultimately responsible for transforming the relationships of the stakeholders who shape the system and for evolving the system toward the desired outcomes.

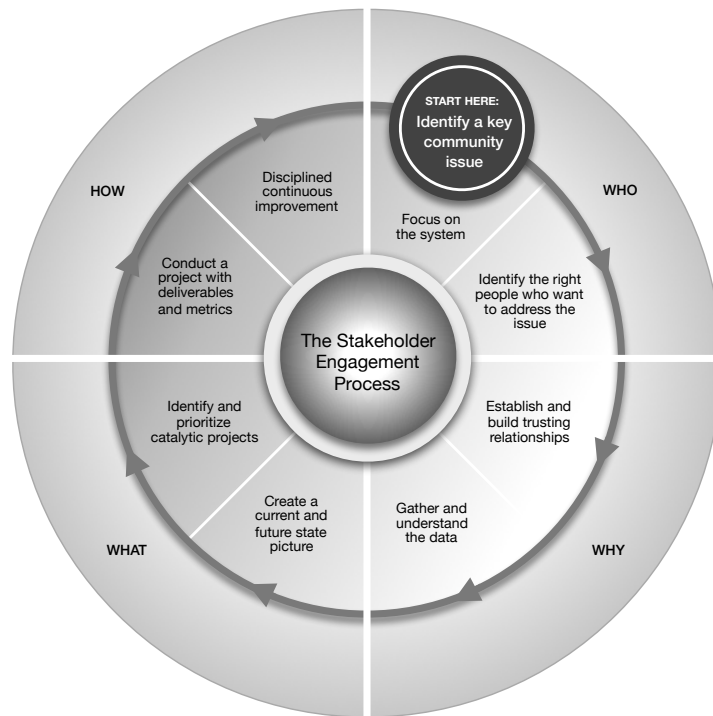
It's important to note that the work of redesigning a complex social system is not linear; the work is never complete. It's a creative endeavor and an act of continuous improvement. Therefore, as a reminder of this principle, the engagement process is depicted as a circle or a wheel, rather than a line which has a definitive beginning and end.

Supported by the guiding team, a group of stakeholders moves around the circle clockwise in a disciplined way, participating in a collective conversation that unfolds in stages. There are four stages of the process represented by the quadrants shown in *Framework 2* at the top of the next page.



The Stakeholder Engagement Process

FRAMEWORK 2



The Process Map

Although the four stages of the process generally unfold in the same sequence, a guiding team may select different activities to facilitate within the context of each quadrant to best serve the size of the group, the length of time they have been working together, and the quality of relationships that exist. To illustrate visually the process and its accompanying activities, a process map can be used to create a well-structured and disciplined way of working together.

Effective collaboration requires that the whole group stay focused and together in the same phase of the process. The idea behind process design is that it's possible to plan a structured, but flexible process of collaboration without knowing or predetermining the content of the decisions that will be made.

The Process as a Pattern of Agreements

By working through the four unfolding stages, the engagement process builds on a series of progressively deeper and more comprehensive agreements among stakeholders. Agreement, like trust, doesn't just happen; it has to be built, phase by phase. The evolution of these agreements follows a general pattern and shapes the phases of a collaborative process. The key agreements are:

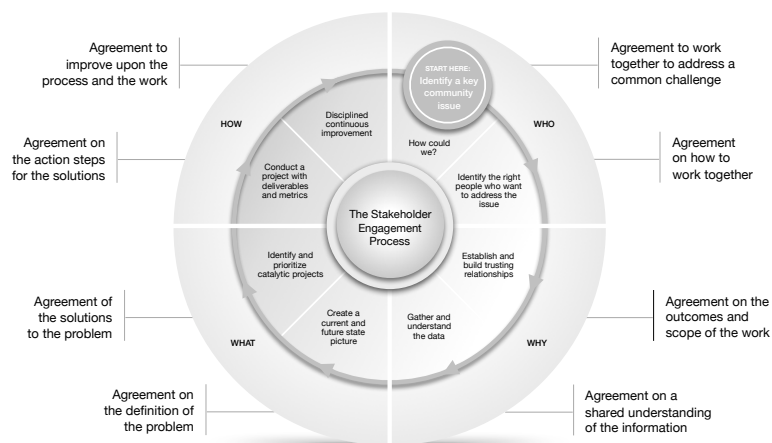
- Agreement to work together to address a common challenge at a systems level
- Agreement on how to work together
- Agreement on the desired outcomes
- Agreement on a shared understanding of the information
- Agreement on the definition of the challenge
- Agreement of the solutions to the challenge

THE PROCESS
IS A SERIES OF
AGREEMENTS
THAT FOLLOW A
PATTERN

- Agreement on the action steps for implementing the solution
- Agreement to improve upon the process and the work

If a group has done a good job of building agreements phase by phase, the last phase of decision making is often the easiest. Consensus just seems to emerge.

Also, because the agreements follow a pattern, a good facilitator can easily discover where in the process a group may be if it gets stuck. By walking through the agreements, one by one, it's possible to recognize the last agreement the group has made. And, just like using a map, the group can orient itself as to where it is within the process, and it can also determine the next set of agreements it needs to consider.



The process is a series of agreements that follow a pattern

By building agreement over time, trust begins to form. Trust is an emergent property of the process of engagement, not a precondition. You can't design for trust, and attempting an overt discussion of the issue in most collaborative environments just produces linguistic conformance.

Rather than talk about the idealized or desired qualities of the process, a group needs to create environments and interactions where trust is more likely to emerge. Focus on the process, rather than trying to preset emergent outcomes and you get a more sustainable solution.

THE PROCESS STAGES

The stakeholder engagement process is composed of four unfolding stages that take the shape of a four-quadrant wheel. The right half of the wheel explains the steps for reaching *Shared Understanding*. The left half of the wheel explains the steps for *Collective Action*.

Each stage lays the foundation for the next. If any one of the previous stages breaks down—meaning relationships, understanding, or commitment—progress around

the process regresses back to that state. In other words, the process is not a checklist, but an iterative, collective conversation designed to change the current beliefs and behaviors of a group of stakeholders over time.

By unfolding the stages in a consistent and disciplined way, a group can strategically shift a system through multiple small interventions that also change the nature of the working relationships among stakeholders. This is a subtle, but significant difference in approach. Instead of the natural focus to tackle issues and solve problems, the process shifts the emphasis to working on relationships in the system through collective efforts to address issues and problems.

The mutually-reinforcing stages of the process are:

Getting Ready: Defining the Challenge and the System

Stage 1: *Who*—Get the System in the Room

Stage 2: *Why*—Help People to See the System

Stage 3: *What*—Co-Create Solutions Together

Stage 4: *How*—Redesign the System by Changing Ways of Working Together

Repeat: Continuously Improve the Work and the Process Itself

STAGE 1: WHO—GET THE SYSTEM IN THE ROOM

Once the challenge has been defined and the underlying system has been named, scoped, and its purpose identified, a group can begin working around the stages of the stakeholder engagement process circle.

The first stage of the engagement process is about the *relatedness* of the people and organizations that make up the system. This fact should come as no surprise as it's the transformation of relationships that ultimately transform the system.

What to Know: A Way of Thinking

The **objectives** of this process stage:

- Identify and document the stakeholders—the people and organizations who are a part of the system.
- Understand the identified relationships: how do they work and what kinds of interactions occur among the stakeholders at different points of time.
- Determine the strategy for engagement: when and how should the various stakeholders be engaged in the process.
- Convene the right stakeholders to “get the system in the room.”

Guiding **questions** to be collectively discussed by the group:

- *Who* wants to take responsibility for the success of the whole system?
- *Whose* relationships most shape the outcomes of the system?
- *Who* should be engaged at this point in time?
- *Who* needs to be engaged to get a microcosm of “the system in the room?”
- *Who* do we need in the room to make something different happen?



The Guiding Team

The Role of the Guiding Team

For this stage of the process, the guiding team can serve and support the collective work in the following ways:

- **Convening Leadership**

The primary role of conveying leadership is to nurture relationships by getting people to the table and keeping them there. The stakeholder map serves as a powerful visual reminder of who needs to be engaged and what relationships are to be transformed and shaped over time. Consider using this stage of the process to conduct a check-in with the stakeholders about the overall health of the partnership. Invite and engage any new stakeholders that were identified by the mapping process. Provide an orientation to any new members by reviewing the collective work of the process to date. Ensure that the composition of the stakeholder group is balanced among the public, private, and social sectors. Personally contact any disengaged stakeholders and address any challenges or concerns that they may have.

- **Key Stakeholders**

Share your personal knowledge about the system including your awareness of what people, programs, organizations, and relationships exist. Think about your own personal relationships within the system. What new relationships might you form as a result of conducting the stakeholder mapping exercise? What existing relationships could be further strengthened or improved?

- **Process Facilitators**

A facilitator serves as a process guide, a tool giver, neutral third-party, and process educator. And you may find yourself playing all of these roles during a working session with the stakeholders. As this may be the group's first meeting or experience in working together, the natural tendency of the collective conversation is to gravitate toward discussing the problem or presenting predetermined solutions. To the best of your ability, keep the discussion focused on the relationships among the stakeholders. After all, this is what the group is ultimately trying to understand and shape over time.

Facilitate the stakeholder mapping exercise, providing the instructions to the group. At every meeting, be prepared to take pictures of the stakeholders as they work together through the various activities of the process. The pictures serve as powerful reminders of the process at work. Take the completed stakeholder map created by the group and consider rendering it in a word processor or presentation software. The document will make it easier to update the map in the future. The resulting stakeholder map becomes an "artifact" of the process. As a facilitator, your role is to capture as many artifacts as possible in order to make the invisible process tangible and concrete, especially for newcomers to the work. Consider creating a presentation slide deck—a sort of digital scrapbook— that captures all of the artifacts from the process.

Use the completed stakeholder map to help the guiding team create a strategy for engagement, addressing when and how the various stakeholders should be engaged in the process. Finally, help the guiding team draft the agenda for the next group meeting. Remind every one about the process timeline and what

the next few steps ahead look like.

- **Backbone Support Staff**

If backbone support staff services are available at this stage, consider helping the process facilitator prepare the stakeholder map and agenda for the next session. Help the convening leaders set up “check-in” appointments with key stakeholders. Provide orientation meetings for any new stakeholders to be engaged by the process.

**STAGE 2:
WHY—HELP PEOPLE
TO SEE THE SYSTEM**

The second stage of the stakeholder engagement process is about creating a *shared understanding* of the challenge and its underlying system. Through a collective conversation, and by gathering and sharing information and data, this process stage helps people see the larger context, showing them they are a part of something bigger than themselves.

By evolving their understanding, the stakeholders begin to realize how they have individually contributed to co-creating the current reality. They complete the process stage when they start to see current reality as something they have created, instead of something that exists outside and independent of themselves.

What to Know: A Way of Thinking

The **objectives** of this process stage:

- Locate responsibility in the system. Determine what role or function the stakeholders play in the system. Ask the question: How have we, individually, contributed to co-creating the current reality?
- Discover the shared outcomes the stakeholders expect the system to produce and inventory the strengths and capacities they bring to the table.
- Collect local stakeholder knowledge from those living and working in the system everyday. (primary information)
- Gather and share the systems-level data and information. (secondary information)
- Create a shared understanding about the information.
- Document the current landscape of the existing work underway.
- Create a current state picture of the system as it is today—the “system on a page.”

Guiding **questions** to be collectively discussed by the group:

- *Why* are we here and why are we working together?
- *Why* is the challenge worth addressing?
- *Why* is the current system of relationships structured like it is?
- *Why* is the system currently producing the outcomes that it is?



The Guiding Team

The Role of the Guiding Team

For this stage of the process, the guiding team can serve and support the collective work in the following ways:

- Convening Leadership

Before the guiding team or extended stakeholder group disturbs the system in any way, they must first understand its behavior to know why it's producing the outcomes that it is. Starting with the behavior of the system and collecting and understanding the data forces the group to focus on facts, not theories. Starting with the current behavior and data also discourages the common and distracting tendency we all have to define a problem not by the system's actual behavior, but by the lack of our favorite solution.

This stage is one of the most challenging phases to navigate a group through because there is a natural and political tendency to want to “get something done.” “When are we going to do something?” is a common question posed during this stage. But until there is a shared understanding about the stakeholders, their work, and the underlying system or context, taking any action can actually make the system perform worse as the group can sub-optimize the parts at the expense of the whole. Remember: the stakeholder engagement process is not about just solving the same problem over and over again. That's problem-solving. Instead, the process is about systems-building: redesigning the underlying system to dissolve the problems we want to see go away.

During this stage, the role of the convening leadership is to keep people focused and engaged on the importance of the collective “why”:

- **Shared outcomes:** We can't coordinate and align something around nothing. We must understand what we believe the system is supposed to create for people and then organize ourselves around those outcomes.
- **Shared data:** Without data, we're just another group with an opinion.



Collectively understanding the shared outcomes the system should be producing

- **Shared understanding:** We must come to a shared understanding to build trusting relationships and create a better understanding of the underlying context that is producing the current outcomes.
- **The current state map:** We need a shared snapshot of the big picture so we can co-create the future, together.

- Key Stakeholders

Key stakeholders should be prepared to share important aspects of their work including: their organization's programs and services, served populations, desired outcomes, and key data to which they have access. They should also be prepared to present the information, explaining what the data means and what challenges or opportunities it may create for the group.

- Process Facilitators and Content Experts

For this stage of the process, there are three essential tasks to facilitate: help the group determine the desired outcomes that the system should be producing, help the group collect and understand the information and data, and help the group create a current state map—a picture of the system on a page.

As a first step, facilitate the shared outcomes exercise. Once complete, help the group synthesize the desired outcomes by grouping similar responses into affinity groups or themes. Bring the synthesized collection of desired outcomes back to the group for review and refinement.

Next, help the group determine how to best collect the primary stakeholder information. Consider using the current landscape tool to capture: Who is doing what for whom, why are they doing it, and how is success measured? Consider planning learning journeys so the group can go see the system at work. Help the group identify any positive deviants in the system; those people who have discovered ways of making the system work for them within the existing context, given the same resources and constraints as every one else.

Next, help the group determine what systems-level data they have, what is being shared among the group, and what they still need to collect. Design a data show and tell event, giving each of the stakeholders an opportunity to present and explain data they may have to share about their work. See that the data is documented and stored in a common repository.

Finally, help the group create current state map by determining which kind of map(s) may be the most beneficial in depicting the current state of the system. Identify who could help to render the map on a page. Bring the completed current state map back to the group for review and refinement.

- Backbone Support Staff

If backbone support staff services are available at this stage, consider helping the process facilitator refine the shared outcomes responses generated by the group into a single document. Help the guiding team plan and organize any field trips and stakeholder interviews or focus groups when collecting the primary stakeholder information.

Take the current landscape tool responses generated by the group and synthesize those responses into a single document. Help the group keep a record of all of the systems-level data collected including: the data type, who collects it, population level covered, geographic level, and the frequency that it is collected. Finally, help to create and render the current state map or identify who could create the document.

**STAGE 3:
WHAT — CO-CREATE
SOLUTIONS TOGETHER**

The third stage of the stakeholder engagement process is about shifting the collective focus from problem-solving to co-creation. This is the stage where people begin to see the possibilities of building things together, strengthening their collective commitment to redesigning the system in the spirit of a virtual barn raising.

What to Know: A Way of Thinking

The **objectives** of this process stage:

- Use appreciative inquiry to shift the collective conversation from “what’s wrong here?” to “what’s working well and how could we do more of it?”
- Identify and prioritize a few high-level things that the group could do together that no single organization could do alone.
- Identify mutually-reinforcing activities at multiple levels that could transform the system.
- Create a future state picture of the system.
- Build a portfolio of projects that offer a combination of substantive short-term wins, as well as more ambitious, long-term systemic strategies that may not show impact for several years.

Guiding **questions** to be collectively discussed by the group:

- *What* are the high-level things we could do together that no one organization could do alone?
- *What* do we want to co-create together?
- *What* is working well and how could we do more of it—what could be scaled up, connected, coordinated, and aligned?
- *What* improvements might we contribute to the collective work?



The Guiding Team

The Role of the Guiding Team

For this stage of the process, the guiding team can serve and support the collective work in the following ways:

- Convening Leadership

The primary goal of this stage is to identify and collectively commit to pursuing a few catalytic projects focused on redesigning the system and changing the underlying conditions responsible for creating the social problems being addressed.

Setting the tone for this stage is a key convening leadership task. The use of appreciative inquiry can be helpful, keeping the stakeholders focused on what's working well and what possibilities exist for improving the system. Remember, in systems work, any improvement must be directed at what the group wants to co-create together (possibilities), not at what it doesn't want (problems). The absence of something in no way guarantees the presence of what it is the group wants to see happen.

Use the principle of co-creation to build trust among the group: building relationships by building things together over time. Ensure that there is a balanced blend of shorter-term, mutually reinforcing actions, as well as an integrated longer-term strategy.

- Key Stakeholders

The primary task of the stakeholders is to address the question: What can we co-create together that no single organization could do on their own?

Finding the right leverage points to address within the system is essential to the task of redesigning it. The solution lies in tapping into the local stakeholder knowledge already present in the system. It's imperative that the stakeholders share their knowledge of the system and identify what specific contributions their sector could make to improve the overall outcomes of the work.

- Process Facilitators

For this stage of the process, begin by using the lens of appreciative inquiry to shift the conversation of the group from "what's wrong here?" to "what's working well and how could we do more of it?" Using the appreciative inquiry-influenced questions, document and synthesize the stakeholder group's responses.

Stimulate a collective conversation by using one or more of the generative frameworks: the tri-sector co-creation map, the collective opportunities matrix, and the systems building framework. Each framework is designed to elicit a different perspective of thought about what could be co-created by the group. The tri-sector map uses the role the stakeholder plays within the community to consider what they might contribute to the work based on their unique strengths and resources. The collective opportunities map ensures the discipline for considering not only new ideas, but also existing ideas that are already working well, whether they exist within or outside of the community. The systems building framework ensures a comprehensive approach for sustained behavior change by identifying mutually reinforcing activities targeted at multiple levels that could transform the system.

Using the ideas created by the generative frameworks, help the stakeholders identify not one, but several catalytic, system redesign projects. Encourage each stakeholder to undertake the specific set of activities at which it excels in coordination with the actions of others.

- Backbone Support Staff

Keep a project portfolio of the ideas generated by the group. Update the portfolio each turn of the engagement process. Ensure that the portfolio

contains a combination of substantive short-term wins, as well as more ambitious, long-term systemic strategies that may not show impact for several years.

**STAGE 4:
HOW—REDESIGN THE
SYSTEM BY CHANGING
WAYS OF WORKING
TOGETHER**

The fourth stage of the stakeholder engagement process is about redesigning the system by fundamentally changing ways of working together.

The goal of effective collaboration is to create *shared understanding* about the system, and *shared commitment* about the possible ways it could be redesigned and improved. The redesign of the system demands that the stakeholders change their ways of working together by improving the relationships among them and organizing themselves around the collectively agreed upon aim of the system.

What to Know: A Way of Thinking

The **objectives** of this process stage:

- Commit to changing ways of working together by improving relationships.
- Plan, organize, and implement the prioritized catalytic projects.
- Create a strategic goal tree so people can visually understand how the collective work interrelates and how progress is evaluated.
- Let the group's collaborative structure emerge from the identified work. Periodically review the structure to ensure that it is coordinated and aligned with the work being conducted.
- Create, maintain, and share an agreed upon set of measures that lead to improved outcomes.
- Create a communication process that ensures the effective flow of information and data with all stakeholders.
- Determine what backbone support services may be required; the organizations who could potentially convene, host, serve, and support the work.

Guiding **questions** to be collectively discussed by the group:

- *How* can we shape our relationships to improve the way we work together?
- *How* could we coordinate and align our work to achieve better outcomes?
- *How* can we structure ourselves to increase our collective capacity?
- *How* is success measured?
- *How* can we continuously improve upon our work and the process itself?



The Guiding Team

The Role of the Guiding Team

For this stage of the process, the guiding team can serve and support the collective work in the following ways:

- Convening Leadership

The primary goal of this stage is to help the stakeholders examine their relationships and organize their work together. Remember: by the time the group enters the fourth stage of the process, they have made a commitment to

work together on a few catalytic projects to redesign the system. Although there may be consensus, there most likely won't be complete agreement. One role that convening leadership can play is to "check in" with those stakeholders who may have provided their consent, but the chosen prioritized projects were not necessarily their first or desired choices. This stage is where these stakeholders may "check out" of the process and disengage. Explore alternative ways the stakeholders might be able to engage or participate in some facet of the work. Ensure the stakeholders that the group will be going through the stages of the engagement process again and that there will be new and different ways to participate in the collective work. Do the very best to keep the stakeholders interested and at the table.

This stage is also a good time to conduct communications and outreach with the supporting stakeholders that are not directly engaged in the process, but who support the work in other ways such as members of the media, funders, policy makers, and other key supporters. Describing the process, who has been involved, the collective work taking place, and how success is being measured are all key discussion points. If the work is far enough along consider preparing and releasing performance scorecards or status update reports.

Finally, help the group of stakeholders prepare for the next turn of the process circle. Conduct a discussion about what was learned, what can be improved about the work, as well as facilitating the process itself. During the next several turns of the process circle, ensure that more of the people being served by the system are represented and engaged within the core stakeholder group. While these stakeholders may have been "a voice" in the early stages, they should be more engaged at the decision making table, and ultimately, empowered to use the engagement process to address their own challenges experienced within the system. Also, work to ensure greater equity within the work; not just sameness, but fairness.

- Key Stakeholders

Through the process, stakeholders make the commitment to changing ways of working by improving relationships within the system and improving the desired outcomes. The key questions to address during this stage of the process:

- What opportunities exist to form or strengthen relationships?
- How might we create new ways of working together?
- What information or feedback might we need to improve our collective work?
- What might we need from others in order to be more effective?
- Are there roles missing in the system that need to be played that currently aren't being fulfilled?

Once the questions have been addressed, the final task is to determine how to best organize the collective work, what kind of working structure would best serve and support the work, and how will progress be assessed.

- Process Facilitators

During the last stage of the process, the stakeholders identified and prioritized a few catalytic projects to work on together. For this stage, there are three

significant activities that need to be facilitated in a specific order.

To lay the foundation for the process stage, help the stakeholders conceive of and design potential relationship pilots. A relationship pilot is a low-risk, time-bound experiment that gives stakeholders the opportunity to experience new ways of working together. Document the commitments made to work together, and facilitate the stakeholders coming back together to review their progress.

Help the stakeholders to define and organize the work based on the identified and prioritized projects. If the group has created a number of projects during their work together, consider creating a strategic goal tree that describes how the work is aligned to produce the desired outcomes. Each time the stakeholder group makes its way around the process circle, update the goal tree to reflect the collective work of the group.

Next, help the group design or reshape the collaborative structure to best serve and support the work. Remember, the collaborative structure should emerge from the work, not the other way around. When the work of the group changes, have the stakeholders examine how the collaborative structure may have to change to best support the collective activities. Update the collaborative structure chart as necessary.

Next, help the group determine how success will be measured. Like the collaborative structure, metrics should be determined only after the work has been defined. Have the stakeholders consider creating or updating a collective scorecard. Ensure that the indicators and goals reflect the real welfare of the system. Be especially careful not to let the group confuse effort with results or they'll end up with a system that is producing effort, not results.

Finally, help the group conduct a collective discussion about the results of the work: what was learned, what can be improved about the work, as well as how the process itself could be improved or better facilitated in the future. The stakeholder group will need some time to get itself coordinated and begin its collective work together. As a facilitator, there is a natural tendency to want to begin the process again. It's extremely important, however, to let the group have the necessary time to work together as these activities help to build and strengthen relationships. It's best to have the stakeholder group continue meeting to update and report on progress. Use the meetings as an opportunity to assess the mood of the group, and always go where the energy wants to travel. It's the best barometer for determining when the group is ready to once again move through the stages of the stakeholder engagement process.

- **Backbone Support Staff**

As the stakeholder group makes its way around the stakeholder engagement process, there is an increasing need for backbone support services. Systems-level work requires the creation of a new set of skills and resources to assemble and coordinate the specific elements necessary for collective action to succeed.

The expectation that collaboration can occur without a supporting infrastructure is one of the most frequent reasons why it fails. Backbone support requires a

dedicated staff separate from the participating stakeholder organizations who can plan, manage, and support the initiative through ongoing meeting facilitation, technology and communications support, data collection and reporting, and handling the myriad logistical and administrative details needed for the initiative to function smoothly. Some of these support services include:

- Strategic Alignment
- Communications
- Community Outreach
- Data Collection and Reporting
- Mobilization of Funding
- Project Management



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CONTACT

Institute for Coalition Building
4555 Central Avenue, Suite 2100
Columbus, Indiana 47203-1893
(812) 314-8509

www.coalitionbuilding.org

Led by a team of pragmatic practitioners, the Institute for Coalition Building creates the tools and frameworks that form the underlying foundation for the practice of community collaboration

