



*A Tamarack Workshop Series
for Communities Ending Poverty and Communities Building Youth Futures*

Collaborative Governance and Leadership

Gratitude & Acknowledgement

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.



We invite you to share your location

The Tamarack Team



Liz Weaver



Natasha Pei



Trisha Islam

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.

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



REDUCING POVERTY
DEEPENING COMMUNITY
BUILDING YOUTH FUTURES
CLIMATE TRANSITIONS

Vibrant Communities
TAMARACK INSTITUTE

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 your 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 Natasha or Trisha 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

Small Group Facilitation Tips

- 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

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

Today's Agenda

Pre-Workshop	Workshop Session 4 Evaluating Collaborative Leadership Experiences
<ul style="list-style-type: none">• Access and review the Collaborative Governance web page of resources	<ul style="list-style-type: none">• Welcome to the Workshop• Making Connections and Homework• Navigating the Collaboration Cycle• The Collaboration Cycle as a Mapping and Planning Tool• Focusing on Collaborative Leadership• Assessment Tools for your Tool Box• Open Forum• Your next steps



Making Connections Exercise



Reflection and Homework

Review and Complete the Sustainability Self Assessment Tool

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TOOL | SUSTAINING COLLECTIVE IMPACT EFFORTS

Building a collective impact approach requires the engagement of a diverse team of leaders, a focus on community impact and evaluation and learning. Sustaining collective impact efforts is about engaging, in unique ways, all the resources available to the collaborative. Sustaining collective impact is also about identifying which elements in the collective impact framework need to be sustained and how.

THE PRE-CONDITIONS AND CONDITIONS OF COLLECTIVE IMPACT

The 5 Conditions of Collective Impact	
1. Common Agenda	• Common understanding of the problem • Shared vision for change
2. Shared Measurement	• Collecting data and measuring results • Focus on performance management • Shared accountability
3. Mutually Reinforcing Activities	• Differentiated approaches • Coordination through joint plans of action
4. Continuous Communication	• Consistent and open communication • Focus on building trust
5. Backbone Support	• Separate organization(s) with staff • Resources and skills to organize and coordinate participating organizations

The collective impact framework consists of three pre-conditions and five conditions for community change. The pre-conditions are: engaging influential champions; identifying urgency of issue and ensuring there are adequate resources.

The conditions for effective collective impact efforts to emerge are: agreement on a common agenda and strategies; identifying shared measurement; leveraging mutually reinforcing activities; building continuous communications and the support of a backbone infrastructure. When considering sustaining collective impact efforts, it is important to consider which conditions are working well and what needs to be enhanced or changed.

BUILDING YOUR SUSTAINABILITY APPROACH

Lydia I. Marek, Ph.D. and Jay A. Mancini, Ph.D. from Virginia Polytechnic Institute and State University Blacksburg researched and developed an approach which identified seven factors of sustainable community change. This approach to sustainability has a direct correlation to collective impact efforts. The seven factors identified include: leadership competence; effective collaboration; understanding the community; demonstrating results; strategic funding; staff involvement and integration; and community responsibility.

Source: https://cabs.arizona.edu/sfcs/cyfernet/evaluation/Sustaining_2007_cyfar_pp.pdf

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?

The Collaboration Cycle

The Collaboration Context

- Local Context
- Complexity of the issue
- Convening organization
- Collaborative partners
- Community readiness

The Collaboration Cycle

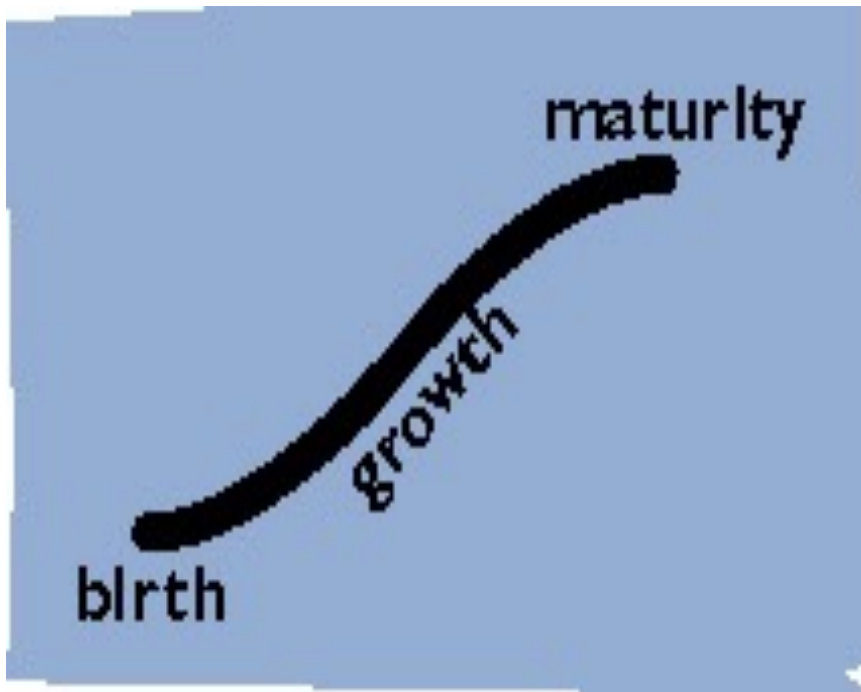
In emergent strategy, the concept of a collaboration cycle draws on **biological research** into the closed loop system of development, conservation, destruction, and renewal that is seen in **natural (ecological) systems**. The collaboration cycle suggests that the long-term sustainability of adaptive organizations requires that elements of those organizations undergo periodic, natural processes of destruction and regeneration.

The Collaboration Cycle and Systems Thinking

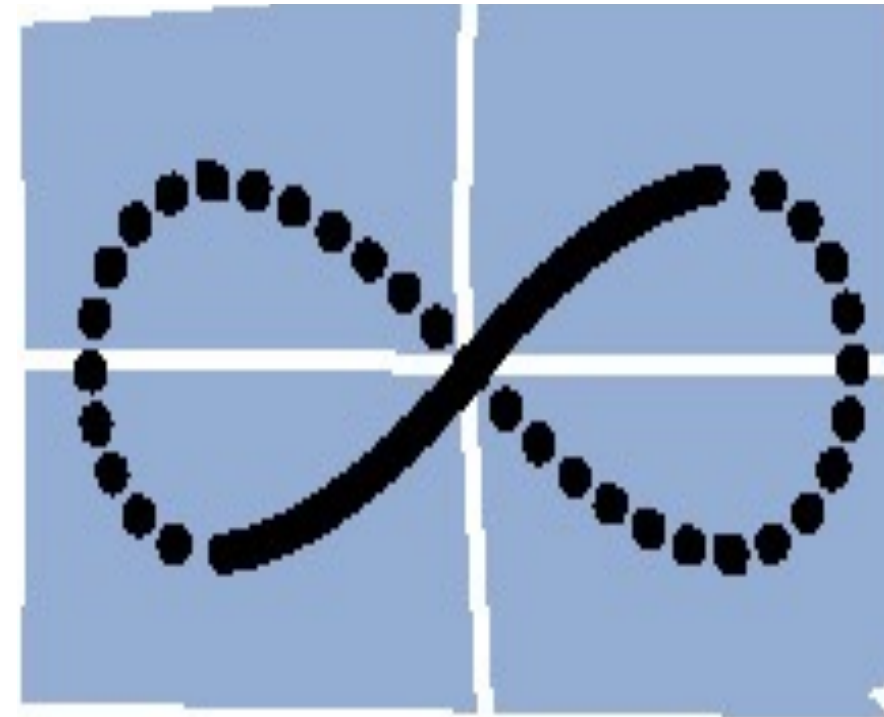
- Understand how an organization is **allocating its energy and resources** across the collaboration lifecycle (and/or how this allocation has **changed over time**)
- Determine where the **energy** is in the system and where there are **gaps or blockages**
- Identify **risks** and **diagnose challenges** related to “traps” in the collaboration cycle
- Understand how a strategy or initiative is **evolving** from a lifecycle perspective

The Collaboration Cycle in Two Parts

The Performance Loop



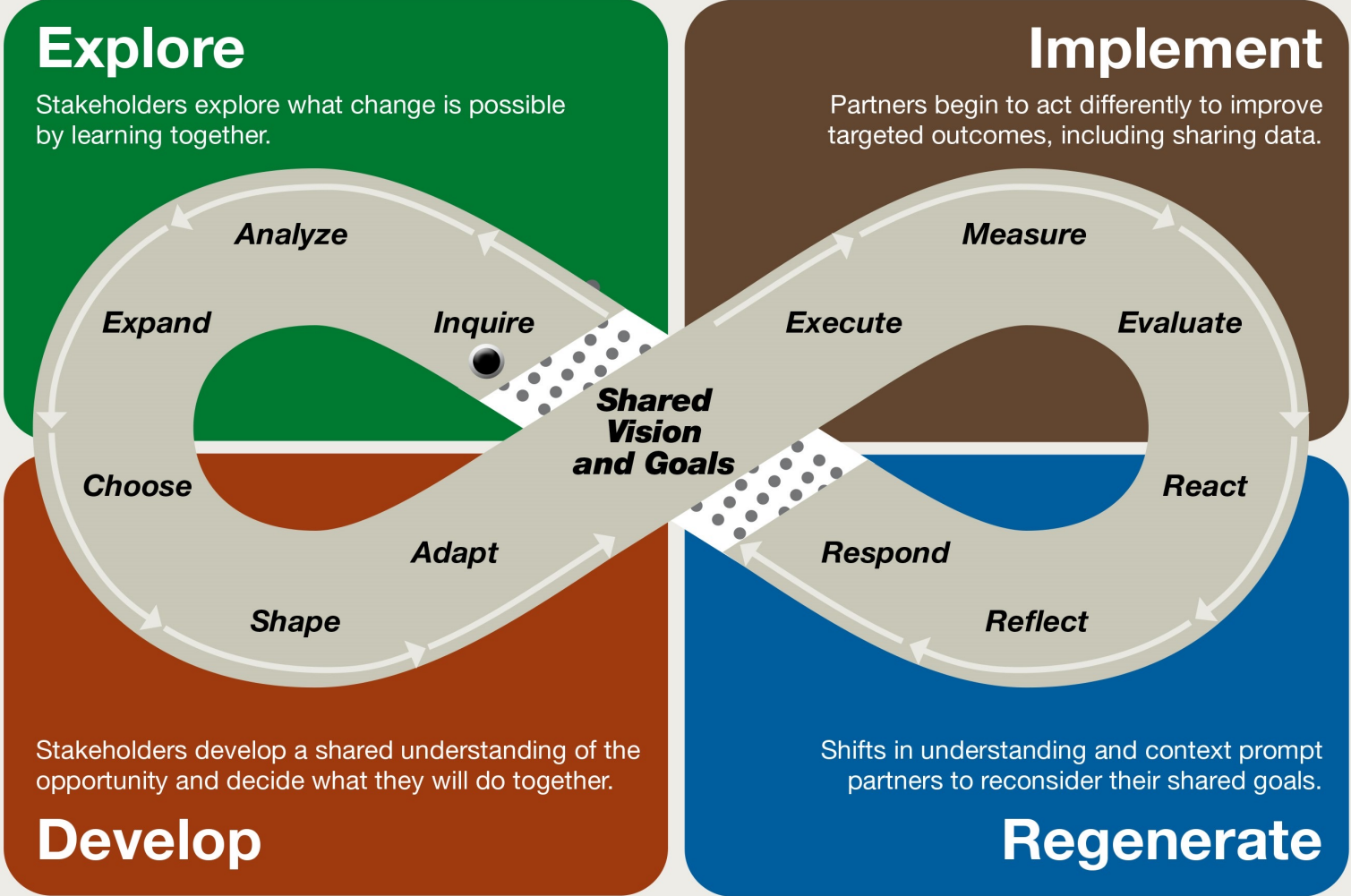
The Renewal Loop



Source: <http://www.plexusinstitute.org>

Collaboration Cycle

Walking through The Collaboration Cycle



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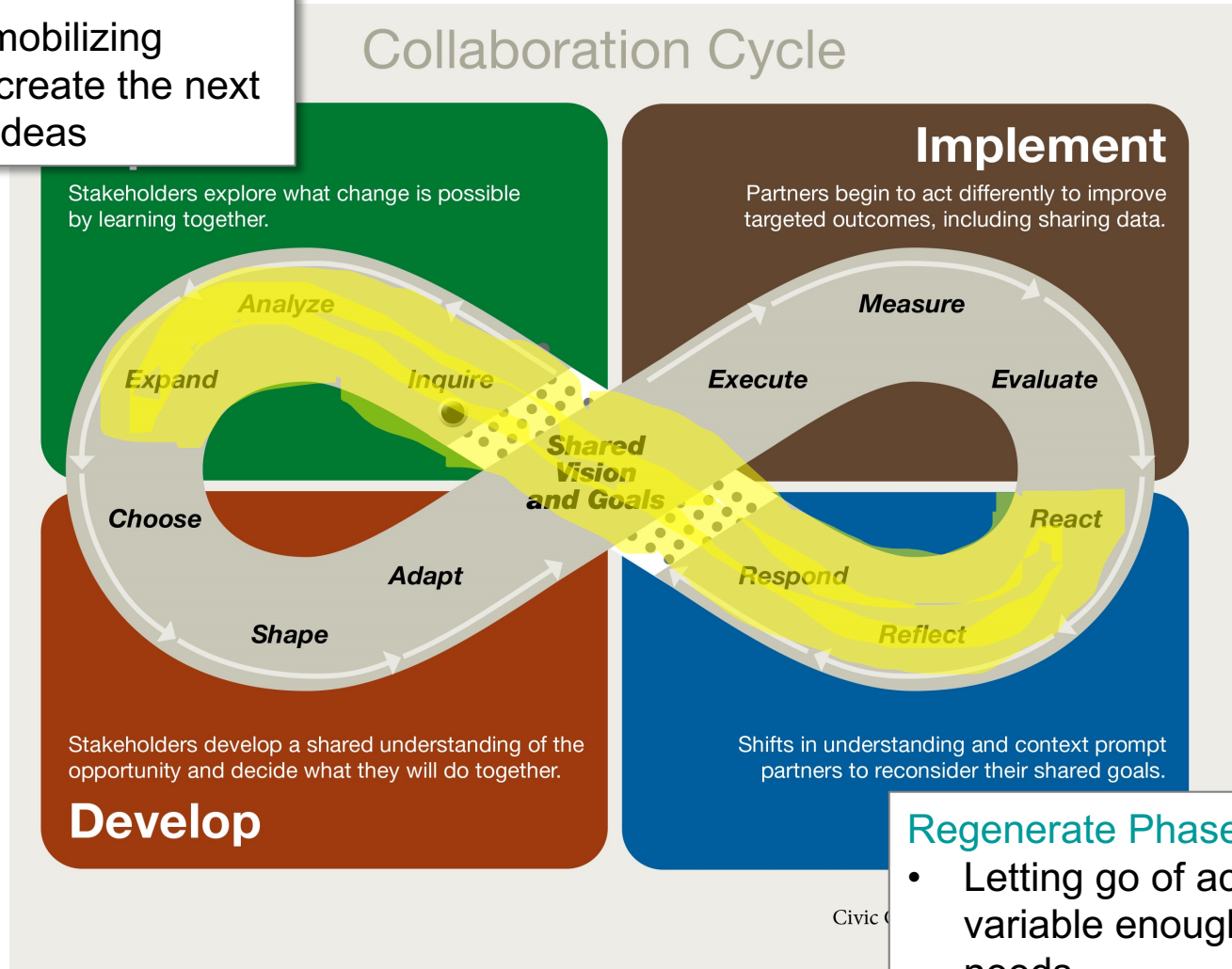
Inspired by the work of Plexus Institute and Tamarack Institute

The Renewal Curve

Collaboration Cycle

Explore Phase

- Creating connections, mobilizing resources and skills to create the next generation of effective ideas



Inspired by the work of Plexus Institute and Tamarack Institute

Regenerate Phase

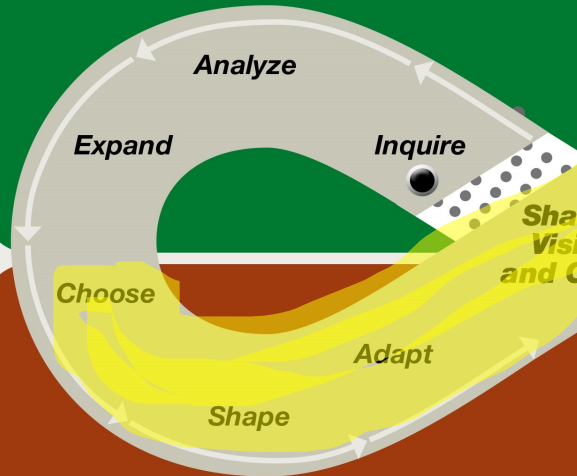
- Letting go of activities that are too rigid, not variable enough, or not responsive to current needs
- Freeing resources and creating the conditions for new ideas
- Crucial phase – creation requires destruction

The Performance Curve

Collaboration Cycle

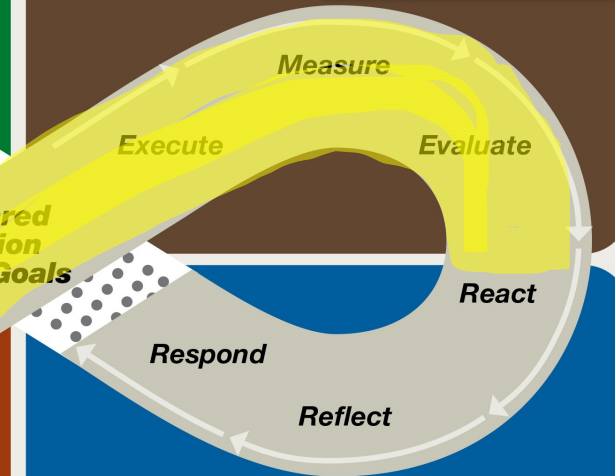
Explore

Stakeholders explore what change is possible by learning together.



Stakeholders develop a shared understanding of the opportunity and decide what they will do together.

Partners begin to target outcomes.



Shifts in understanding and context prompt partners to reconsider their shared goals.

Regenerate

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Implement Phase

- In-depth planning
- Allocating resources to predictably successful activities
- Streamlining operations for efficiency
- Moving to this phase is the aim of traditional management thinking

Develop Phase

- Entrepreneurial period of high energy and new ideas
- Trial and error learning
- Resources are spread over a variety of projects or activities

Inspired by the work of Plexus Institute and Tamarack Institute

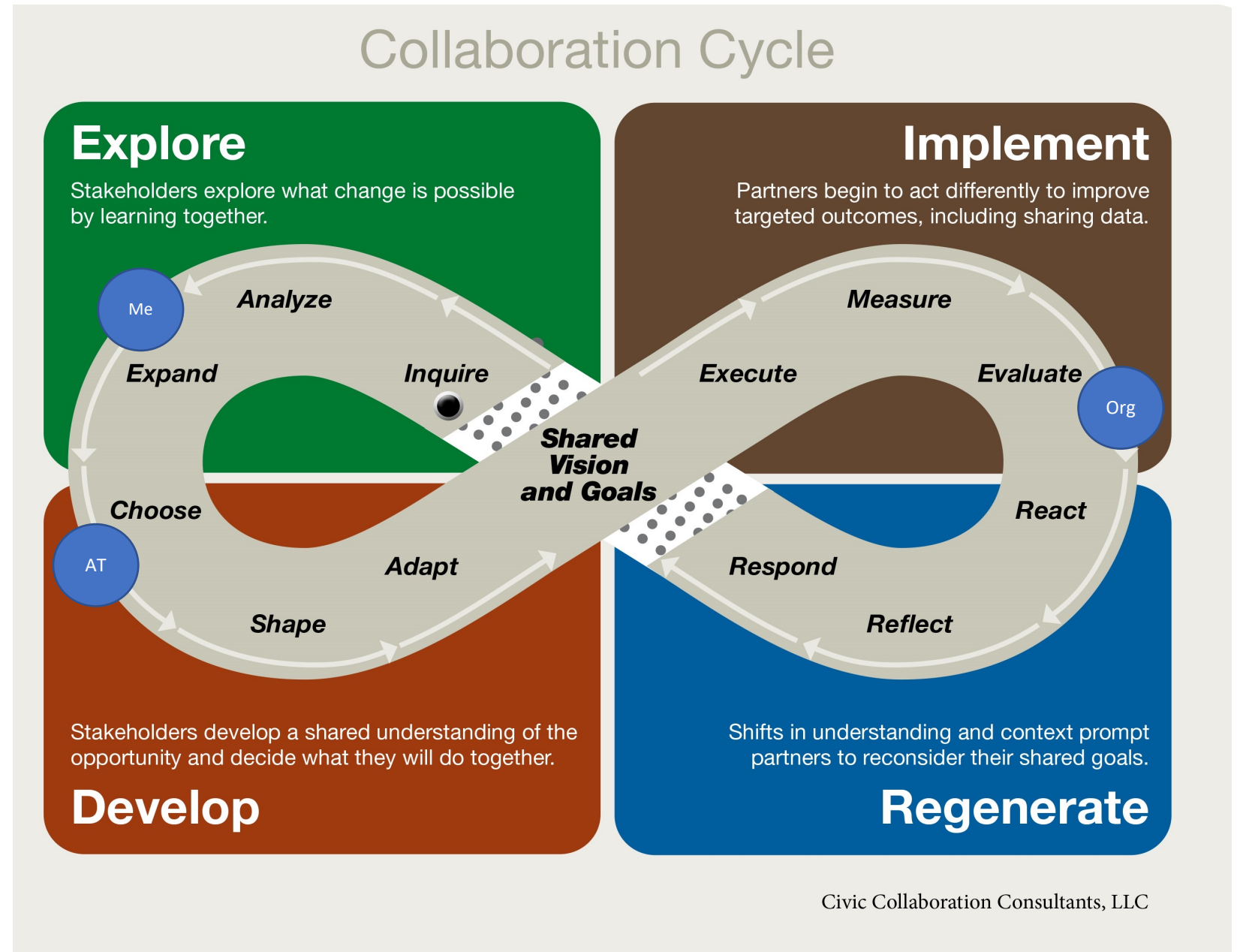
Mapping your Collaborative using the Collaboration Cycle – Mural Exercise

Place a dot on each section of the Collaboration Cycle

- Me
- My Organization
- My Advance Together Collaborative



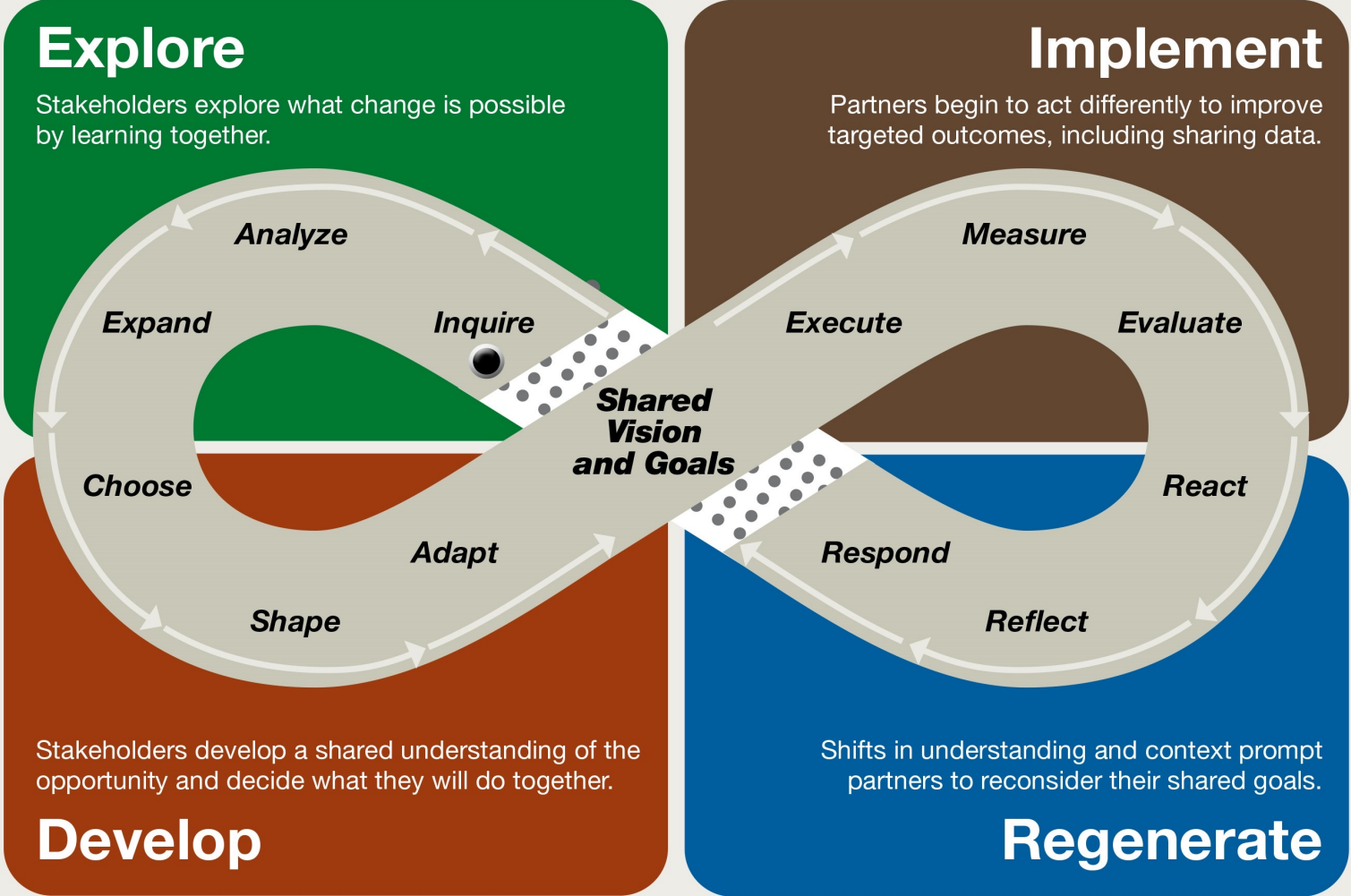
Reflection Discussion: What do you see for your CEP or CBYF Collaborative?



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Collaboration Cycle

Walking through The Collaboration Cycle



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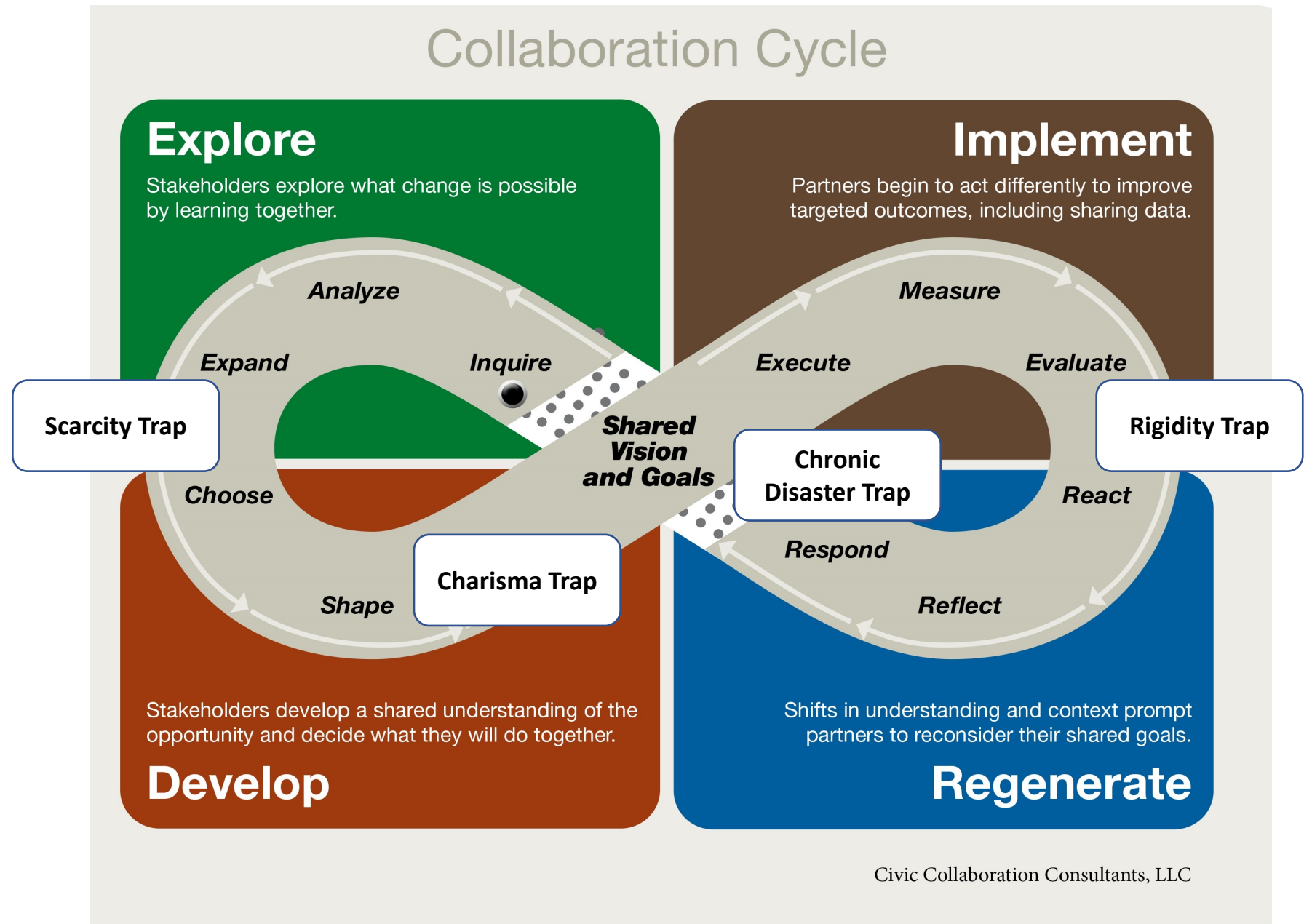
Inspired by the work of Plexus Institute and Tamarack Institute

Collaborative Cycle Mapping

Considerations	Use Collaboration Cycle Mapping	Don't Use Collaboration Cycle Mapping
Boundaries	<ul style="list-style-type: none">✓ You have a clear topic for exploration on which there is some shared understanding among participants✓ Your focus is “looking within” an organization, initiative, or strategy	<ul style="list-style-type: none">✗ The topic for Collaboration Cycle mapping is not yet clear✗ You want to better understand the connections or relationships between activities, actors, or trends
Credible informants	<ul style="list-style-type: none">✓ Participants are familiar with the topic selected for the mapping activity and the organization or initiative's work related to it	<ul style="list-style-type: none">✗ Participants are not able to credibly speak to both the topic and/or the organization or initiative's work in that area

Navigating the Collaboration Cycle Traps

Beware of the Collaboration Cycle Traps



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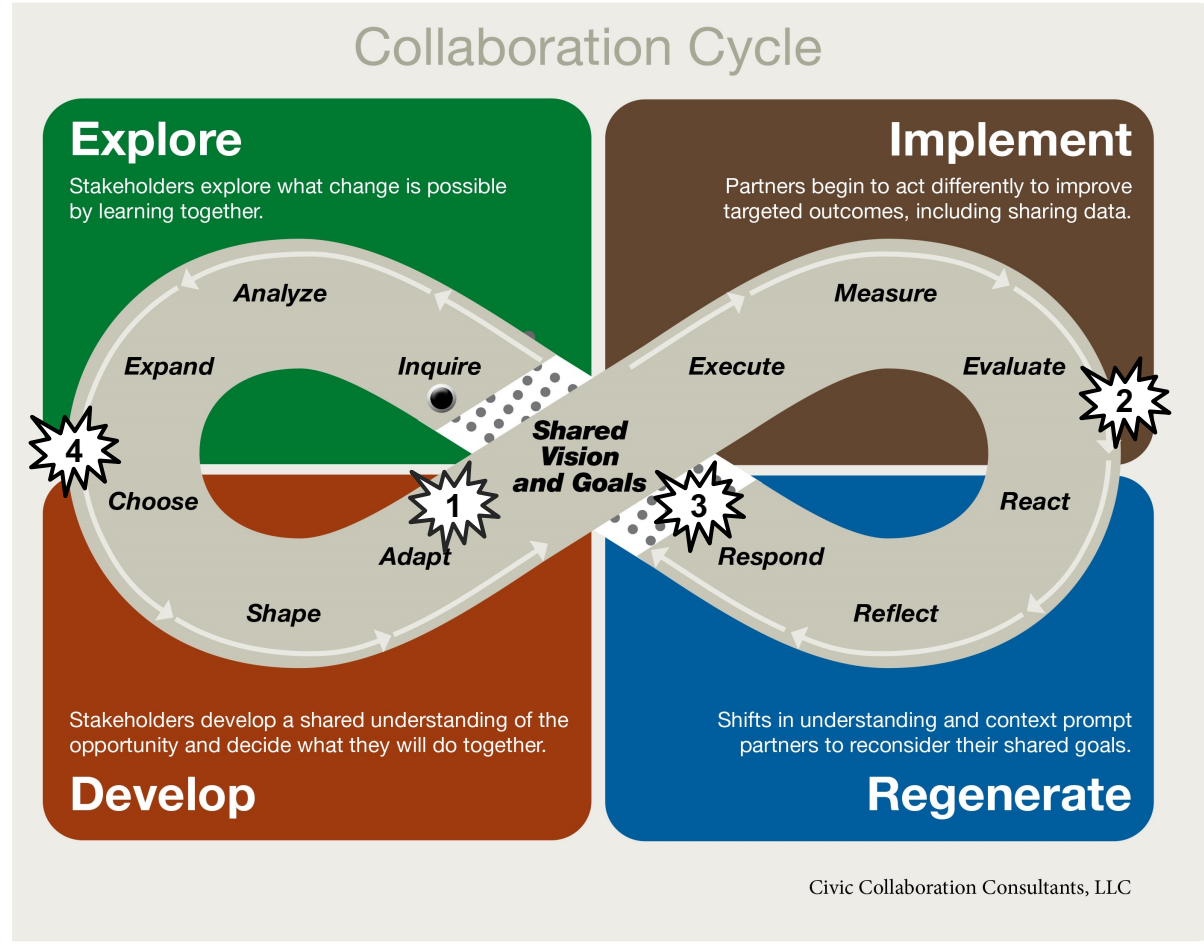
Beware of the Collaboration Cycle Traps

4

Scarcity trap – Lack of compelling ideas and credibility, underdeveloped decision-making processes, energy spread too thinly

1

Parasitic trap – Challenges with growth or sustainability of projects; dependence on startup pool of resources



2

Rigidity trap – Fear of uncertainty, lack of exit rules, pressure to continue by entrenched constituency, fear of failure

3

Chronic disaster trap – Inability to let go of the past, weak trust, difficulty agreeing on a shared vision

Inspired by the work of Plexus Institute and Tamarack Institute

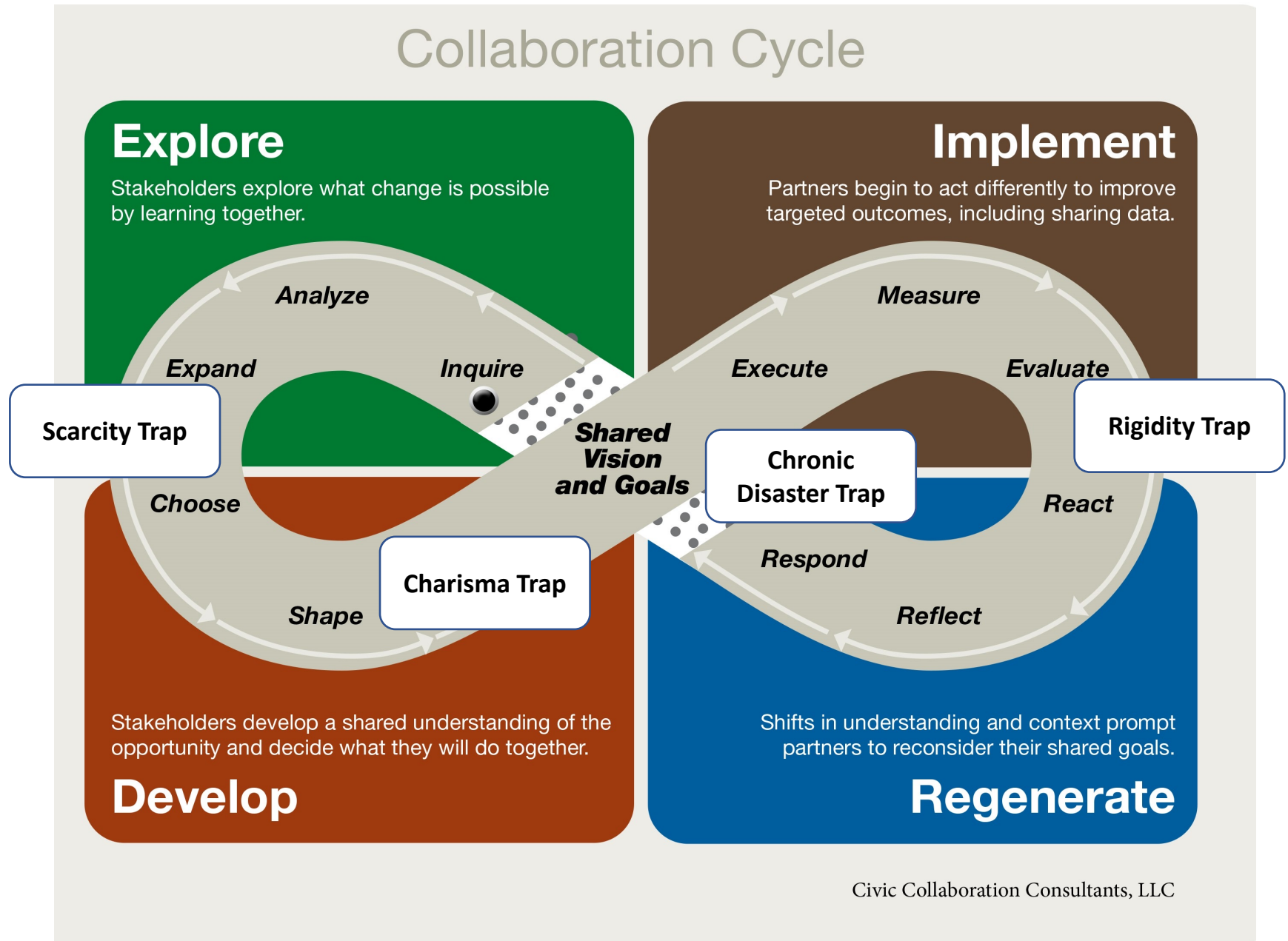
Beware of the Collaboration Cycle Traps

Traps	Description	Challenges
<p>SCARCITY Moving from Exploration to Development</p>	<p>Too few resources are available to support vibrant exploration of new ideas so few or none take root. No new ideas lead to outcomes or garner the support.</p>	<p>The ideas are not compelling. Underdeveloped decision-making process & criteria. Members disagree on which options to pursue. Members have insufficient credibility. Energy spread too thin across many directions.</p>
<p>CHARISMA/ PARASITIC Moving from Development to Maturity</p>	<p>People seem unable to sustain or grow their work without the original founder, host or primary funder. They are “parasitic” on the host(s) that gave it birth.</p>	<p>Over reliance on key – often founding – members of the group. Dependence on start-up pool of resources. Approach works well only at a certain scale or in unique context.</p>
<p>RIGIDITY Moving from Maturity to Creative Destruction</p>	<p>People are unable or unwilling to change or dismantle an approach that no longer fits the evolving context in which they operate. They resist new ideas.</p>	<p>Psyche of immediate return. Fear of uncertainty. Self-Interest. Lack of clear exit rules. Concern about perception of failure. Pressure to continue by entrenched constituency (e.g. ‘too big to fail’).</p>
<p>CHRONIC DISASTER Moving from Creative Destruction to Exploration</p>	<p>People find themselves ‘spinning’ and unable to get traction on a compelling new vision, values and intent for moving forward.</p>	<p>Inability to let go of the past. Weak trust amongst members. Difficulty in agreeing on shared vision and values. Volatile environment.</p>

Beware of the Collaboration Cycle Traps

Small Group Discussion:

- What trap looms ahead of your Advance Together Collaborative?
- What might the Collaborative do to navigate your way through the trap?



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Forward Planning using the Collaboration Cycle

The Collaboration Cycle

The Collaboration Cycle can be an effective tool for forward planning. Using the Collaboration Cycle can assist a collaborative group identify the next phase of their work and the trap that might be embedded in the next phase.

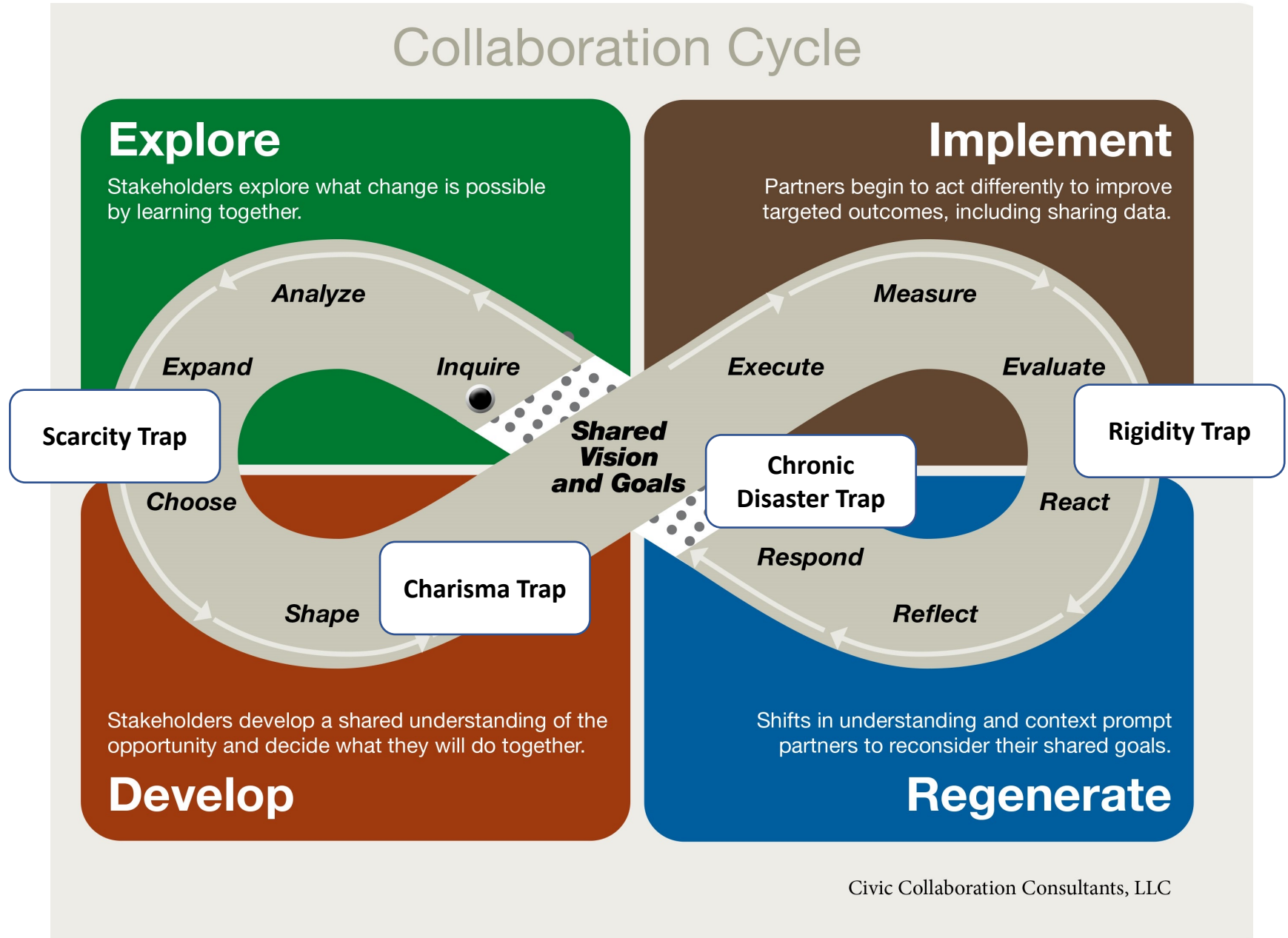
Together, we will use the Collaboration Cycle to plan forward.

Source: <https://www.liberatingstructures.com/31-ecocycle-planning/>

Collaboration Cycle – Planning Forward

Step 1: In your CEP and CBYF Teams:

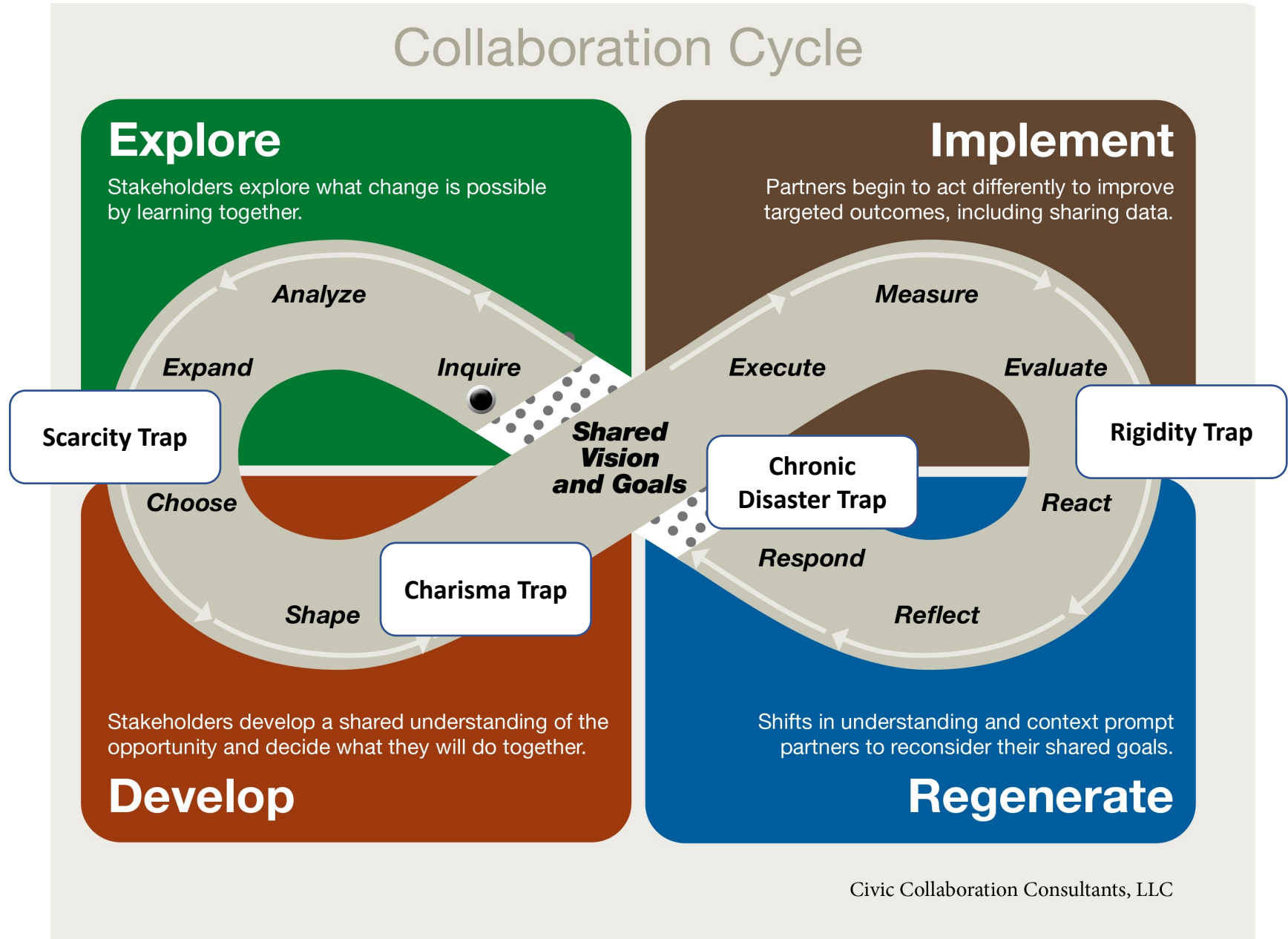
- Confirm where your Collaborative is right now.
- Using Post It Notes in the Mural, describe what you are doing currently in that phase of the Collaboration Cycle.



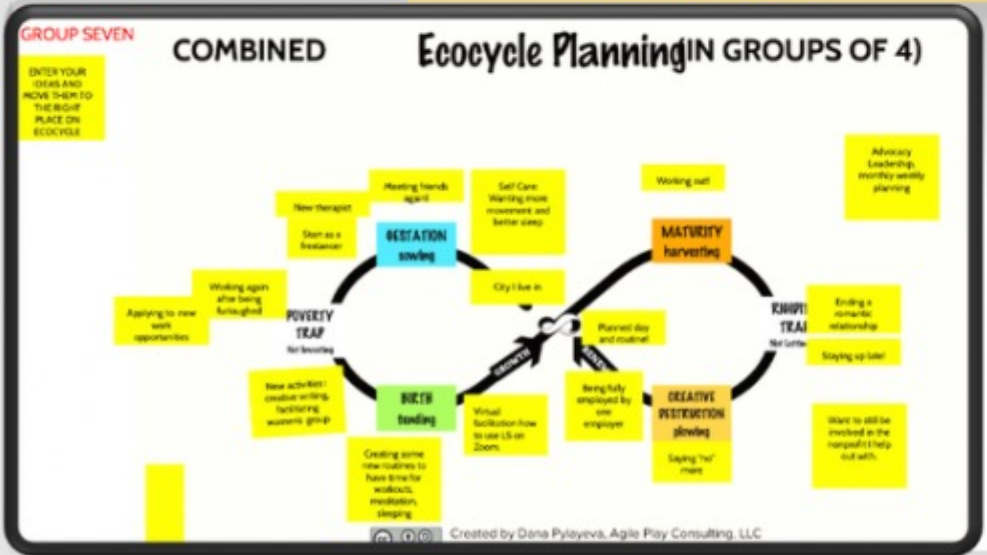
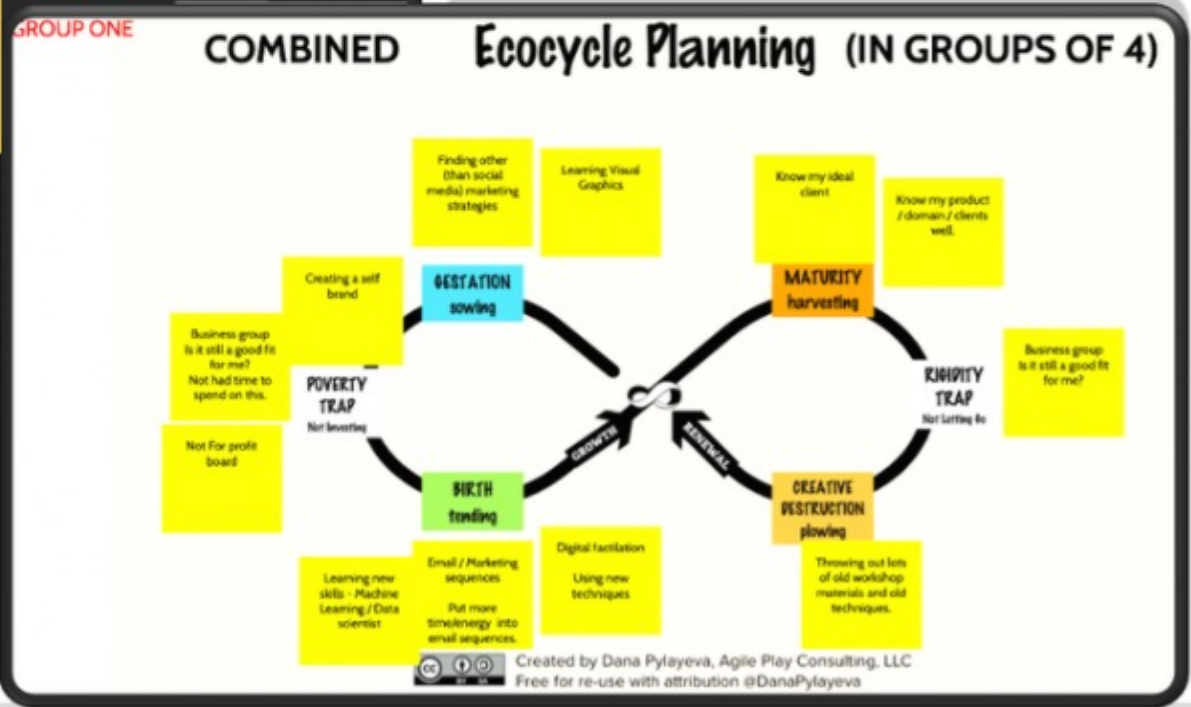
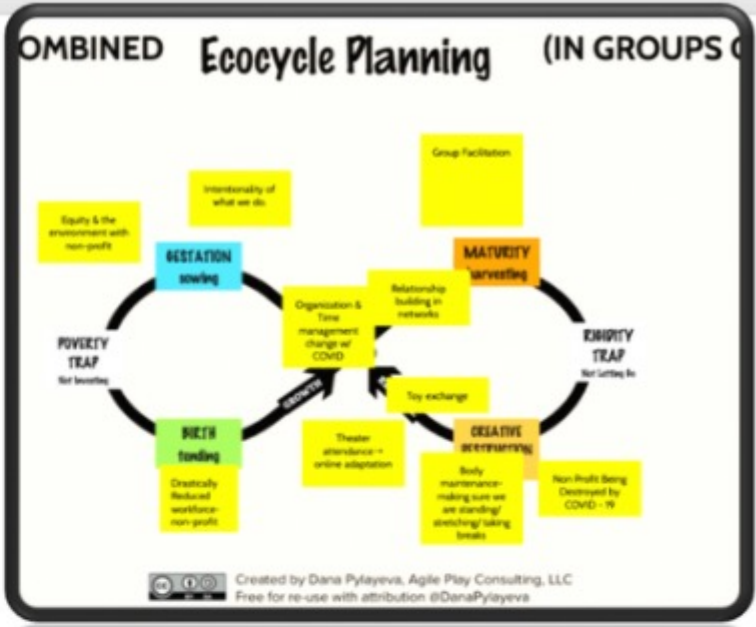
Collaboration Cycle – Planning Forward

Step 2: In your CEP and CBYF Teams:

- Look at the next phase of the Collaboration Cycle.
- Using Post It Notes in the Mural, describe what your collaboration would need to do to effectively plan and develop through that phase.

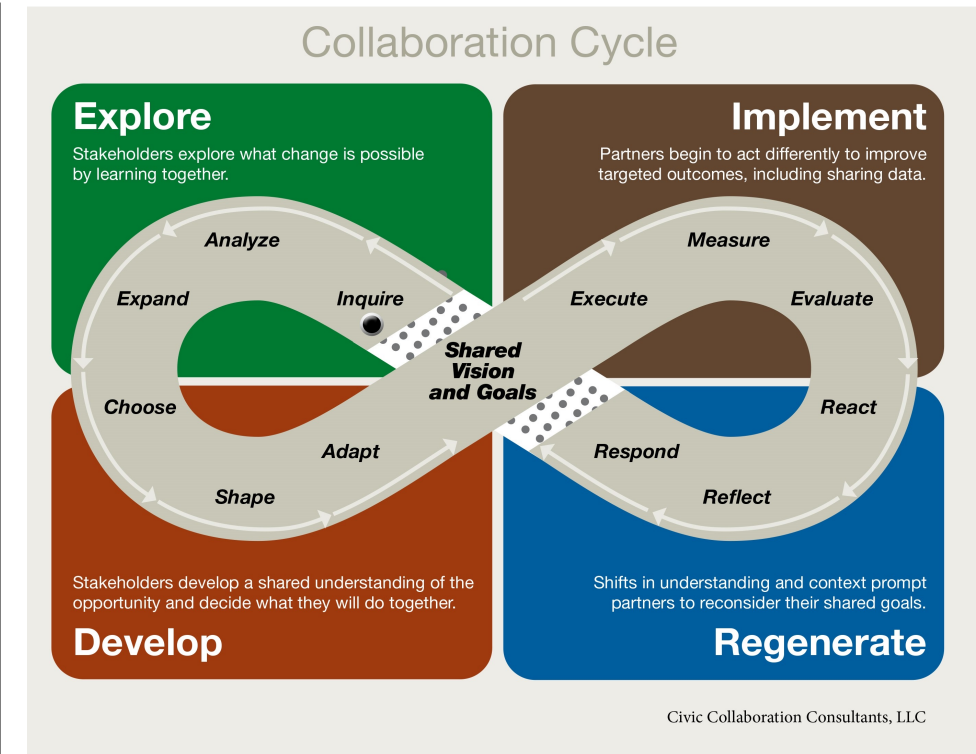


**NYC Liberating Structures Meetup
7/10/2020**



Key Considerations for the Eco-Cycle

- **Collaborative efforts have eco-cycles:** these include development and implementation (the performance loop) and regeneration and exploration (renewal loop).
- **The entire collaboration cycle is critical:** a successful performance loop begins with a solid renewal loop.
- **Situational Leadership:** leadership and management styles, organizational culture and resources should fit the unique phase of the work.
- **Resilient and sustainable collaborative:** the importance of continually adapting and reinventing the collaborative to reflect the distinct phases is key.
- **Natural attrition:** not all collaborative efforts are robust enough to make it through the entire collaboration cycle
- **Patch dynamics:** collaborative efforts are more resilient when they are partly operating in all four phases of the collaboration cycle

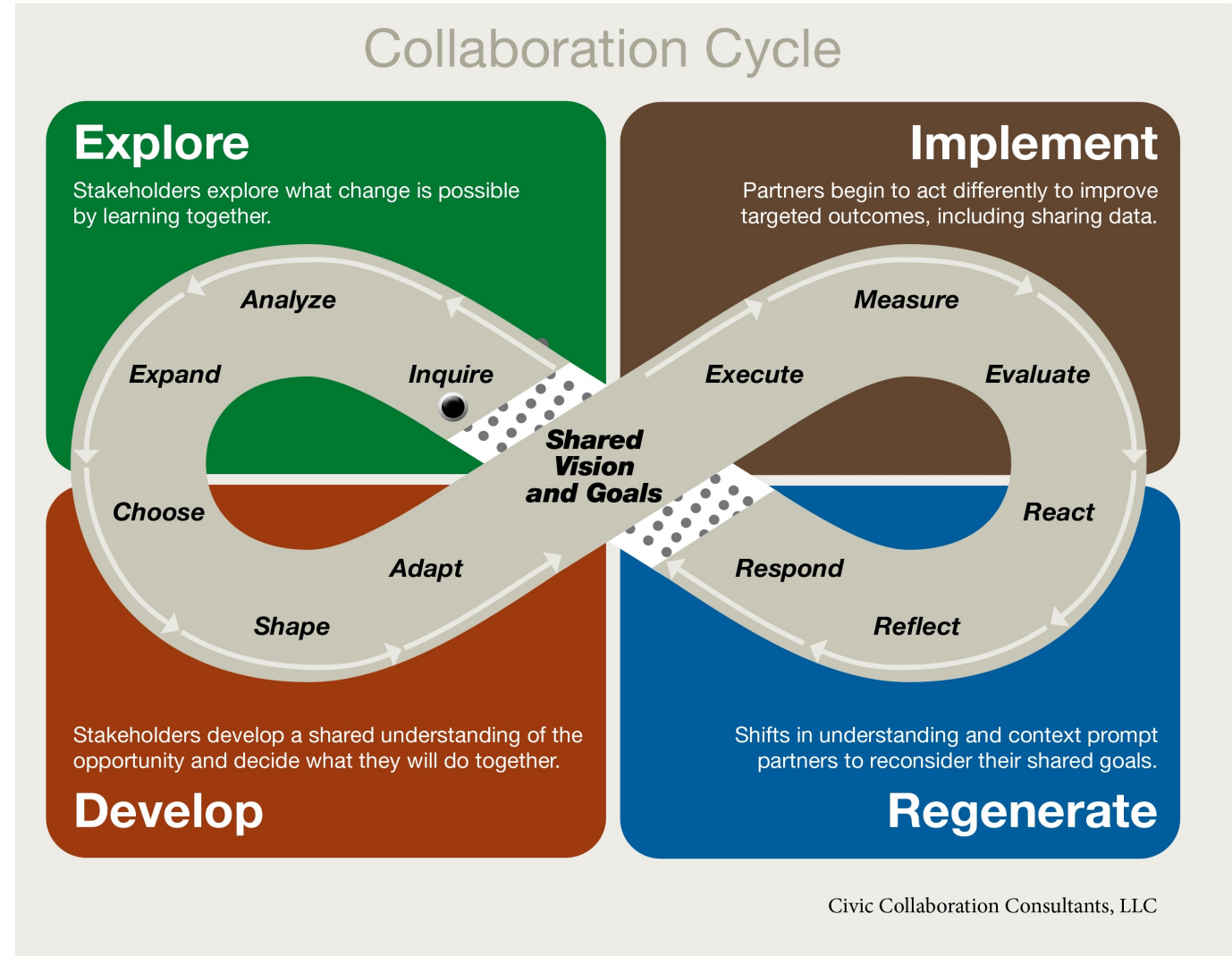


Inspired by the work of Plexus Institute and Tamarack Institute

The Collaboration Cycle

Tamarack's Lessons

- Plan for 3-5 year campaigns
- Different phases require different leadership
- Learning and reflection needs to be built into every phase
- Watch out for traps
- Renewal is critical



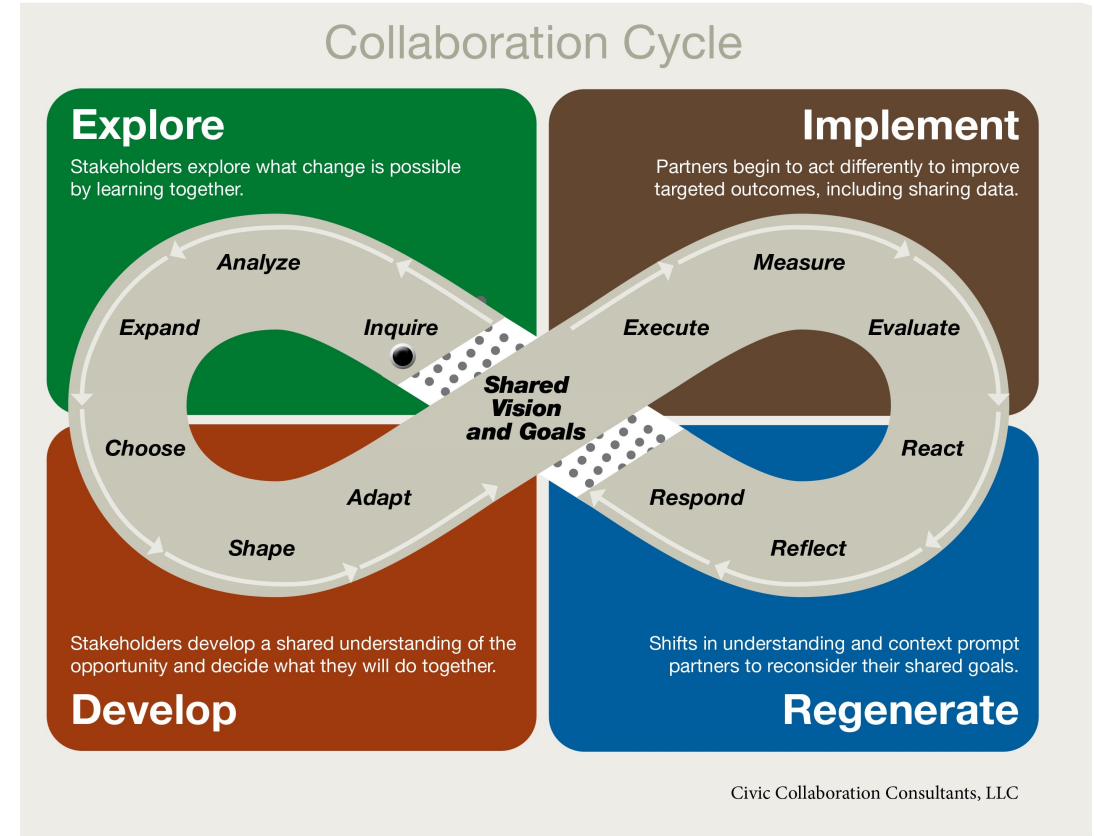
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Inspired by the work of Plexus Institute and Tamarack Institute

For More Information

RESOURCES

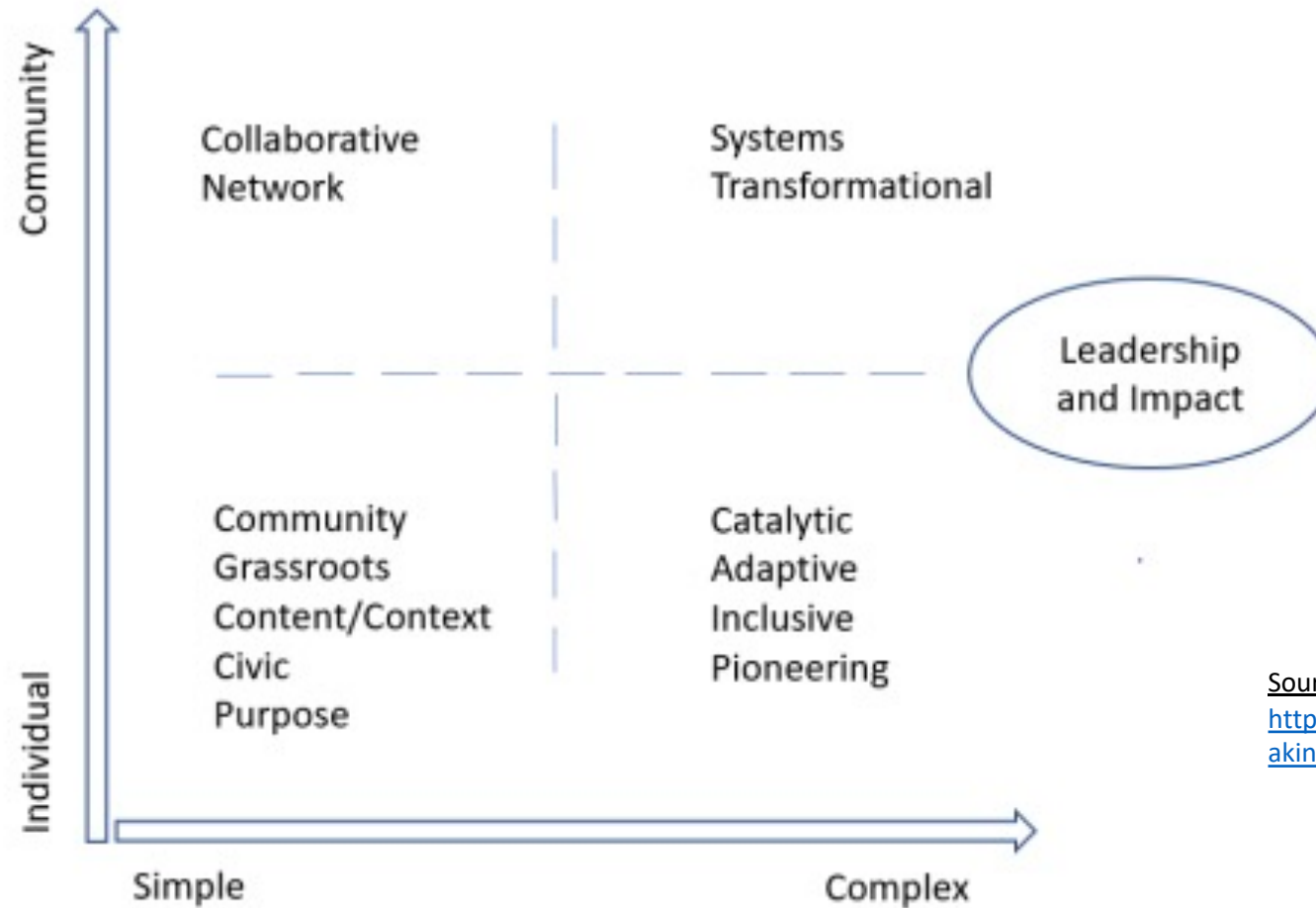
- Plexus Institute: <http://www.plexusinstitute.org/>
- Tamarack – An Institute for Community Engagement - http://tamarackcci.ca/files/resource_at_a_glance_phases_of_collaborative_change_efforts.pdf
- Liberating Structures: <http://www.liberatingstructures.com/31-ecocycle-planning/>



Inspired by the work of Plexus Institute and Tamarack Institute

Focusing on Collaborative Leadership

Making Sense of the Multiple Faces of Leadership



Source:

<https://www.tamarackcommunity.ca/library/making-sense-of-the-multiple-faces-of-leadership>

The Principles for Impactful Collaborative Leadership

Principle 1: Make the voice of the people central

Principle 2: Work across boundaries

Principle 3: Catalyze change and work adaptively

Principle 4: Engage in systemic thinking and action

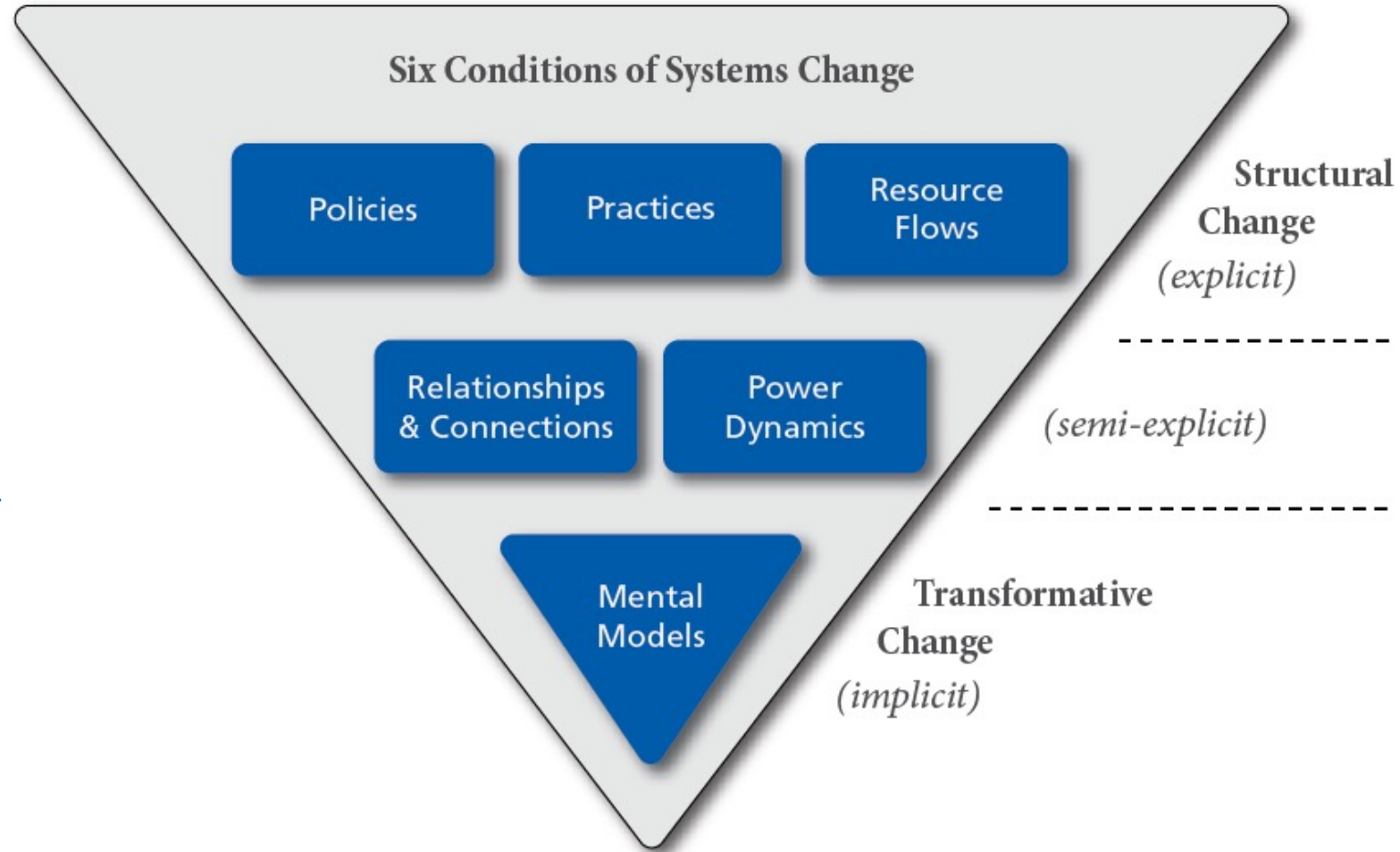
Principle 5: Be courageous

Collaborative Leadership in Disruptive Times

- Protect the core
- Call on cross-functional teams to help solve problems
- Keep people accountable and adjust their deliverables
- Pivot for new opportunities
- Create an agile enterprise from the top down
- Generate insights about where to pivot

Source: [The Covid Two-Step for Leaders: Protect and Pivot](#) – Harvard Business Review

Collaborative Leadership and Systems Change



Source:

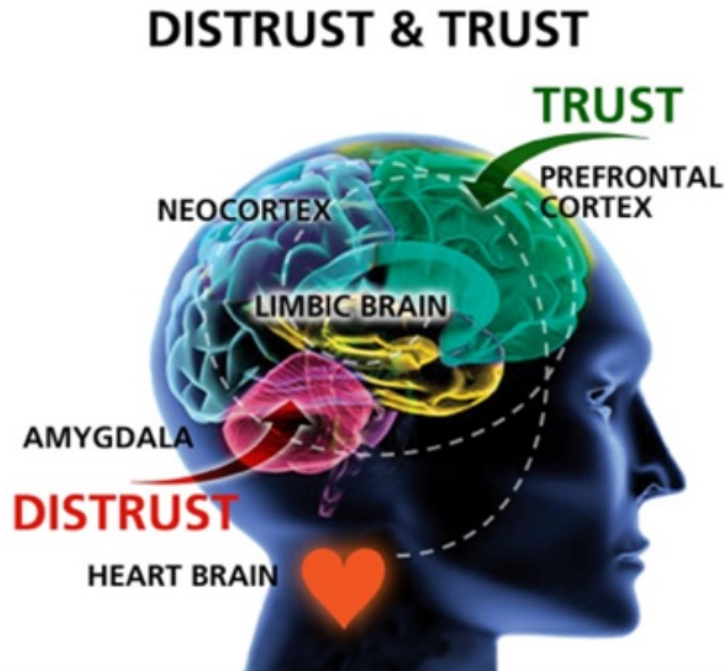
https://www.fsg.org/publications/water_of_systems_change

Collective Leadership



Trust Revisited

Trust Revisited - The Neuroscience of Trust



Source: Judith E. Glaser

<https://www.psychologytoday.com/us/blog/conversational-intelligence/201509/make-candor-priority>

1. **Status** - relative importance to others.
2. **Certainty** - being able to predict the future.
3. **Autonomy** - a sense of control over events.
4. **Relatedness** - a sense of safety with others, of friend rather than foe.
5. **Fairness** - a perception of fair exchanges between people.

You as A Trust Builder

- **Sincerity** – is the assessment that you are honest, that you say what you mean and mean what you say, and that you can be believed and taken seriously. Your actions will align with your words.
- **Reliability** – is the assessment that you meet the commitments you make, that you keep your promises.
- **Competence** – is the assessment that you have the ability to do what you are doing or propose to do - the other person believes you have the requisite capacity, skill, knowledge, and resources
- **Care** – is the assessment that you have the other person's interests in mind as well as your own

Building Trust in a Virtual Environment

- Take advantage of building swift trust
 - Encourage interpersonal trust
 - Communicate with predictability
 - Share and rotate power
-
- Video link – Harvard Business Review - <https://www.youtube.com/watch?v=UYqKaRSW1CI>

Navigating Collaborative Transitions

Nine Ways to Build Collaborative Success

1. Build a clear and compelling case for collaboration
2. Communicate expectations
3. Establish collaborative goals
4. Leverage collaborative member strengths
5. Foster cohesion between members
6. Encourage innovation
7. Keep promises and honor requests
8. Encourage people to socialize
9. Recognize, reward and celebrate collaborative behaviour

Source: <https://www.entrepreneur.com/article/302126>

Build Your Skillset as a Collaborative Leader

- Know your goal
- Strike the habit of complaining
- Use time wisely
- Be an active listener
- Practice conflict management
- Be reliable
- Practice respect
- Share your enthusiasm
- Communicate regularly
- Have strong interpersonal skills

Source: <https://www.proofhub.com/articles/how-to-improve-teamwork-and-collaboration-skills>

TRIZ – An Innovative Thinking Approach

How can we make sure that we reliably
achieve your *most unwanted result*?

Liberating Structures – TRIZ - <http://www.liberatingstructures.com/6-making-space-with-triz/>

TRIZ – An Innovative Thinking Approach

- TRIZ makes space for innovation
- Lifting taboos and sharing heretical ideas can be fun and full of laughter
- Renewal requires destruction, sifting through what should stay and what should go
- Test it as a substitute for visionary planning

Collaborative Beginnings and Endings

Defining the Beginning: Most communities think about how the experience starts, but many do not have a plan how the experience ends. Limiting the collaborative experience might feel like a disadvantage, but communities use this to their advantage:

- it makes the actual experience more intense
- increases activity levels and retention during that core phase
- it provides a clearer narrative for the experience with a start and an end point

Defining the end: Setting boundaries for a collaborative experience:

- based on time
- based on achievements or milestones
- based on adherence with guidelines and rules
- based on other criteria (e.g. age, location, or if a majority feel a membership should be terminated).

Source: The Community Canvas Guidebook

Collaborative Beginnings and Endings

How do members leave the Collaborative Experience?

- Is there ever an end to the experience or does membership continue on indefinitely?
- Is there a separate structure or experience for people who have left the community (e.g. an alumni community)?
- How does the community handle inactive members?

Creatively ending Collaborative Relationships with Individuals

Positive Ending	Challenging Ending
<ul style="list-style-type: none">• Express gratitude for their contributions to the collaborative• Be as specific as possible and relevant to the partner• Ask them two reflection questions:<ul style="list-style-type: none">• What did you think this collaborative did well?• Where could this collaborative effort improve?• What should we do to improve our next collaborative effort• Ask if you can share the information with the other partners• Send a gratitude note or gift personally to the partner or plan for a thank you activity	<ul style="list-style-type: none">• Prepare in advance of the meeting• Ask to meet with the individual one on one• Describe to the individual the impact of their behaviour on the collaborative and their ability to work together• Tell the individual that you are asking them to leave the collaborative table• Discuss and agree to how this will be announced to the collaborative• Thank the individual for participating in the meeting

Creatively Ending Collaborative Relationships – with the Collaborative

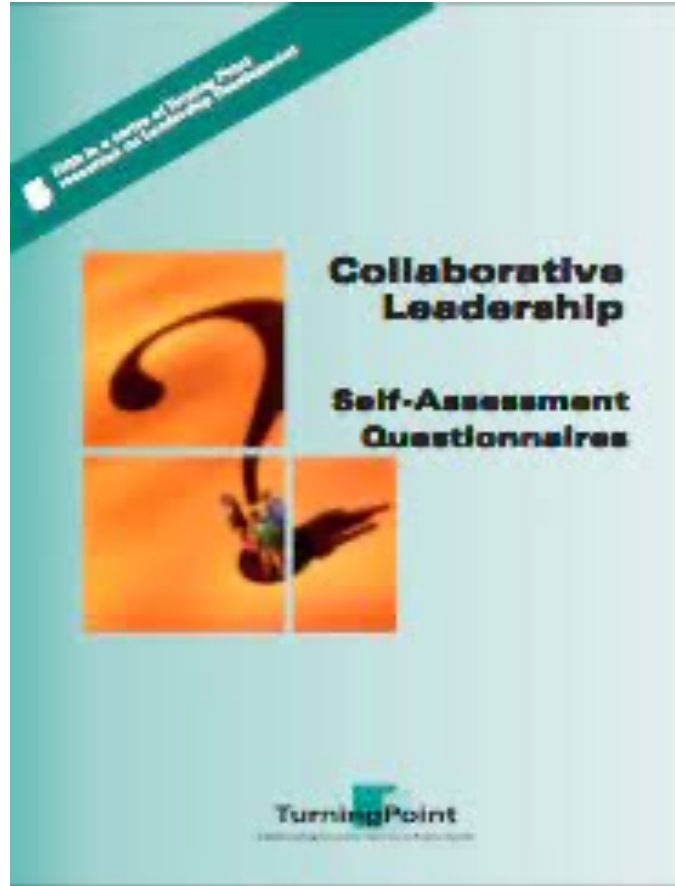
Positive Ending	Negative Ending
<ul style="list-style-type: none"> • Identify that the collaborative project is coming to completion • Host a reflection session with key collaborative partners • Ask the questions: <ul style="list-style-type: none"> • What have we done well? • Where could we have improved? • What should we do to improve our next collaborative effort? • Document your results and share back with partners the results you achieved together • Send a gratitude note or gift to recognize each partners' contributions 	<ul style="list-style-type: none"> • Prepare in advance of this meeting • Share with the collaborative partners the reason for the collaborative coming to an end • Host a reflection session with key collaborative partners • Ask the questions: <ul style="list-style-type: none"> • What have we done well? • Where could we have improved? • What should we do to improve our next collaborative effort? • Document the lessons learned from the collaboration • Send a gratitude note to each partner, where appropriate

The background is a teal color with a textured, rippled appearance, similar to water. There are numerous small, brownish-orange particles scattered throughout, giving it a grainy or organic feel. The lighting is slightly darker on the left side, creating a gradient effect.

QUESTIONS?

Leadership Assessment Tools

Leadership and Community Assessment Tools for your Toolbox



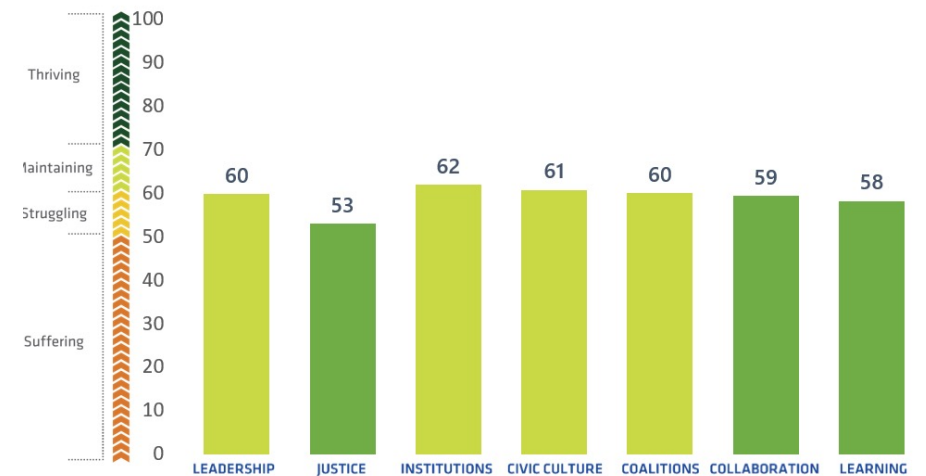
Wilder Collaboration Factors Inventory

- ◆ Developed by the Amherst H Wilder Foundation (Wilder Research Center)
 - ◆ <http://www.wilder.org/home.0.html>
 - ◆ http://surveys.wilder.org/public_cfi/index.php
- ◆ Consists of 20 factors that influence the success of collaborations
- ◆ Factors are grouped into 6 domains
 - ◆ Environment
 - ◆ Membership Characteristics
 - ◆ Process and Structure
 - ◆ Communication
 - ◆ Purpose
 - ◆ Resources

Stakeholder Analysis & Community Readiness

24

Civic Capacity and Community Resilience: Colorado



Open Forum

Getting Ready for Session 5

Collaborative Governance and Leadership Workshop Series

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2:00 – 4:00 pm ET

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November 10, 2021
Time to be arranged



Reflection and Homework

What are your Collaborative Governance questions, challenges and opportunities?

What else would you like to explore?

Submit your questions, challenges and opportunities by October 20th to form the agenda for our final learning session together.

THANK YOU