



ACCELERATING COMMUNITY
CHANGE THROUGH
COLLECTIVE IMPACT
Workbook
March 15, 2017

This Workbook Belongs to:



Liz Weaver, Tamarack Institute
www.tamarackcommunity.ca
#CIRegina

Workshop Facilitation Team:

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About Liz

Liz Weaver is the Vice-President of Tamarack and leads the Tamarack Learning Services. Previously, she led the Vibrant Communities Canada team where she provided coaching, leadership and support to a network of community partners across Canada. Liz is one of Tamarack’s most in-demand trainers. She has developed and delivered curricula on a variety of workshop topics including: collaborative governance, leadership, collective impact, community innovation, influencing policy change and social media for impact and engagement

Prior to joining Tamarack, Liz was the Director for the Hamilton Roundtable on Poverty Reduction, which was recognized with the Canadian Urban Institute’s David Crombie Leadership Award in 2009. In her career, Liz has also held leadership positions with YWCA Hamilton, Volunteer Hamilton and Volunteer Canada. In 2002, Liz completed a Masters of Management through McGill University and her thesis *Storytelling and the Voluntary Sector* was published. Liz was awarded a Queen’s Jubilee Medal in 2002 for her leadership in the voluntary sector and in 2004 was awarded the Women in the Workplace award from the City of Hamilton.

Thank-you to our Partners:



**Accelerating Community Change through Collective Impact
Workshop Agenda
March 15, 2017**

Time	Activity
8:30 am	Set up and Registration <ul style="list-style-type: none"> • Coffee Available
9:00 am	Welcome and Setting the Context for Today <ul style="list-style-type: none"> • Welcome • Review of the workshop goals
9:30 am	Making Connections <ul style="list-style-type: none"> • Who is in the Room • Minute Marathon Exercise • Why is it important that I am here today?
10:00 am	An Overview of Collective Impact <ul style="list-style-type: none"> • The Collective Impact pre-conditions • The 5 conditions of collective impact • Examples of communities implementing collective impact • How to get to systems wide change and impact
11:00 am	Networking Break
11:15 am	Table Discussion <ul style="list-style-type: none"> • How can a collective impact approach help improve outcomes for our organization and for our community?
12:00 pm	Lunch and Networking
1:00 pm	Putting Collective Impact into Practice – Tools to get to Impact <ul style="list-style-type: none"> • The Collaboration Spectrum • The Top 100 partners exercise
2:15 pm	Networking Break
2:30 pm	Putting Collective Impact into Practice – Tools to get to Impact <ul style="list-style-type: none"> • Common Agenda Tool • Mapping Community Resources • Measuring Success Tool
3:30 pm	Next Steps: Top 3 Priorities from Today
4:00 pm	Wrap Up and Thank You

UPCOMING 2017 EVENTS



CITIES REDUCING POVERTY: WHEN BUSINESS IS ENGAGED

Hamilton, April 4-6, 2017

Tamarack's 3rd annual poverty reduction summit will bring together business leaders, community organizers, officials from all levels of government, Indigenous leaders, funders, policy makers, and persons with lived experience to take our collective understanding of multi-sectoral poverty reduction to the next level.

COLLECTIVE IMPACT 3.0

Kitchener May 9-11, 2017

Collective Impact (CI) 3.0 is a three-day intensive workshop for practitioners in early stage, mid stage and later stage community change work. The workshop will explore the latest in the practice of Collective Impact from experts, practitioners and early adopters of the work.



NEIGHBOURHOODS ♥ THE HEART OF COMMUNITY

Mobilizing for Impact
Montreal, June 6-8, 2017

This 3-day learning event celebrates the distinct role that place-based neighbourhood strategies play in engaging citizens and mobilizing local action for community change. The unique social flavour of Montreal and how its growing network of 30 neighbourhood roundtables are transforming the city will be celebrated.

TO LEARN MORE AND REGISTER FOR TAMARACK'S UPCOMING EVENTS PLEASE VISIT THE WEB SITE: WWW.TAMARACKCOMMUNITY.CA/EVENTLISTING



TOOL | Collective Impact at a Glance

Collective impact is not merely a new process that supports the same social sector solutions but an entirely different model of social progress. The poser of collective impact lies in the heightened vigilance that comes from multiple organizations looking for resources and innovations through the same lens, the rapid learning that comes from continuous feedback loops, and the immediacy of action that comes from a unified and simultaneous response among all participants.

www.fsg.org

Collective Impact is the commitment of a group of actors from different sectors to a common agenda for solving a complex social problem. In order to create lasting solutions to social problems on a large-scale, organizations — including those in government, civil society, and the business sector — need to coordinate their efforts and work together around a clearly defined goal.

As a Collective Impact initiative starts to form they should consider the pre-conditions which has been proven to ensure success when initiating a collaborative. Further, research suggests that there are five conditions and five phases that will also help a collective action to succeed. This tool will outline the basic information and questions that one will need to start a Collective.

3 Three Pre-Conditions to Collective Impact

There are three pre-conditions to Collective Impact that are critical to long-term success. These are:

- **An Influential Champion** - An individual or small group who command the respect necessary to bring CEO-level cross-sector leaders together and keep them actively engaged over time
- **Adequate Financial Resourcing** - Adequate financial resources to last at least two to three years and generally involving at least one anchor funder to support needed infrastructure and planning
- **A Sense of Urgency for Change** - A new opportunity or crisis that convinces people that a particular issue must be acted upon now and/or that a new approach is needed

5 Questions to Ponder when Considering Collective Impact

1. Do we aim to affect “needle moving” change? This is a change in the community of +/- 10% or more.
2. Do we believe that long-term investment by several stakeholders is necessary to achieve success?
3. Do we believe that cross-sector engagement is essential for community-wide change?
4. Are we committed to using measureable data to set the agenda and to using it to improve over time?
5. Are we committed to having community members as partners and producers of impact?



Nine Leadership Principles for Backbone Leaders

1. View the system through a lens of complexity
2. Let the vision be “good enough” rather than trying to plan every little detail.
3. Live with balance between data and intuition, planning and acting, safety and risk.
4. Be comfortable with uncovering paradox and tensions.
5. Don’t wait to be “sure” before proceeding with actions.
6. Create an environment of information, diversity and difference, connections and relationship.
7. Mix cooperation with competition – it’s not one or the other.
8. Understand that informal conversations, gossip and rumor contribute to mental models, actions and beliefs. Listen to these in making change.
9. Allow complex systems to emerge out of the interaction of systems, ideas and resources.

Five Things to Consider when Building a Common Agenda

1. Who is driving the agenda? There is a need to work differently together to get to a common agenda – rather than one agenda to “win”.
2. How complex is the issue? By setting boundaries around what you will and will not do you will allow you to increase impact and more easily set an agenda.

3. How does the issue play out in your community? Examine data to inform the common agenda and drive impact.
4. Who is doing what already? Map current community efforts to solve the problem.
5. What is our next step? Get into conversation, explore the problem and talk about what transformation will look like.

Five Conditions of Collective Impact	
Common Agenda	All participants have a shared vision for change including a common understanding of the problem and a joint approach to solving it through agreed upon actions.
Shared Measurement	Collecting data and measuring results consistently across all participants ensures efforts remain aligned and participants hold each other accountable.
Mutually Reinforcing Activities	Participant activities must be differentiated while still being coordinated through a mutually reinforcing plan of action.
Continuous Communication	Consistent and open communication is needed across the many players to build trust, assure mutual objectives and create common motivation.
Backbone Support	Creating and managing Collective Impact requires a separate organization(s) with staff and a specific set of skills to serve as the backbone for the entire for the entire initiative and coordinate participating organizations and agencies.

The 5 Phases of Collective Impact





Resources

Collective Impact, FST Partners-<http://www.fsg.org>

Leading a Backbone Organization for Collective Impact- <http://tamarackcci.ca/blogs/sylvia-cheuy/champions-change-leading-backbone-organization-collective-impact>

Common Agenda & Community Change-
<http://tamarackcci.ca/blogs/liz-weaver/moving-transactions-transformation-common-agenda-and-community-change>

Collective Impact Readiness Tool-
http://vibrantcanada.ca/files/collective_impact_readiness_assessments.pdf



TOOL | The Collaboration Spectrum

The word ‘collaboration’ can be interpreted in many different ways. There is a continuum of different collaborative approaches. As groups move along the continuum they must pay attention to activities that build trust amongst the partners. Collective Impact efforts exist within the stages of the collaboration continuum that include coordination of efforts, collaboration amongst partners and the integration of services and programs. While distinguishes Collective Impact as a form of collaboration is its unique emphasis on: the use of shared data; and, its focus on working together across multiple sectors.

Tool How To:

Step 1 – Ask participants to place a colored dot on a visual of the Collaboration Spectrum to depict the level of collaboration **currently** happening regarding your issue

Step 2-- You can also ask them to place a second different colour dot on the Collaboration Spectrum to depict the level of collaboration that the personally would like to see in addressing your issue.





Step 3 – Debrief and discuss similarities and differences reflected in the placement of dots.

Tool Debrief:

Some suggested debrief questions include:

- How can we get others excited to work with us on this issue?
- What additional information do community partners require (& who should they hear it from)?
- Do we have this information? If not, where can we find it?

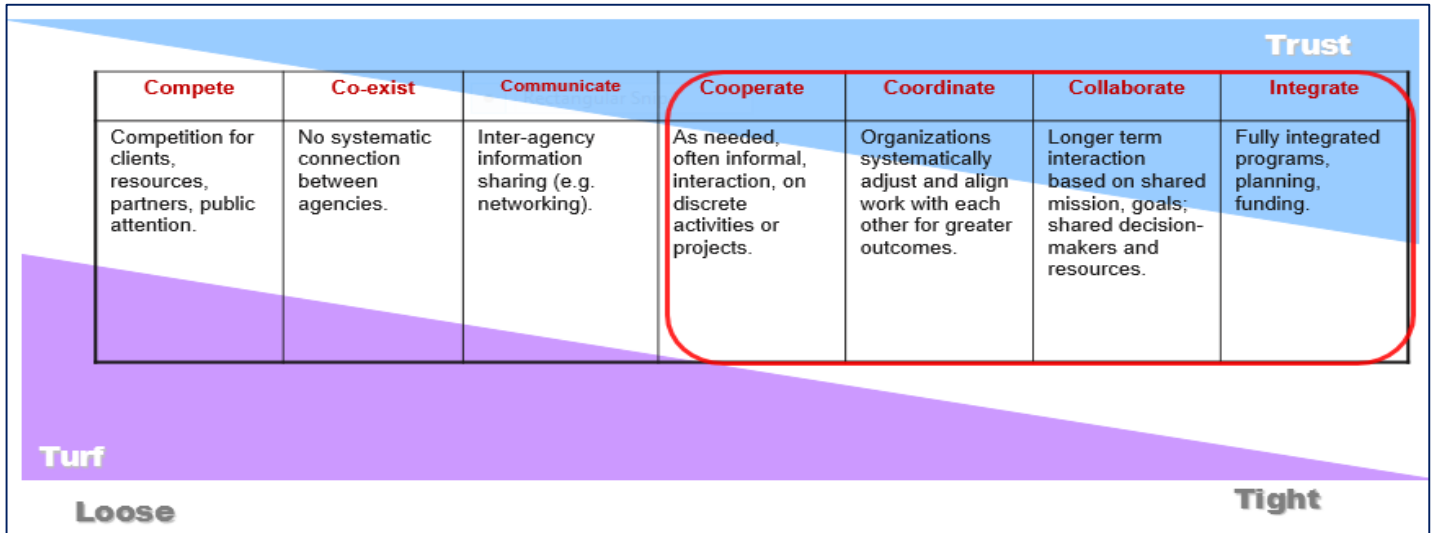
The Collaboration Spectrum – Tool

Compete	Co-exist	Communicate	Cooperate	Coordinate	Collaborate	Integrate
Competition for clients, resources, partners, public attention.	No systematic connection between agencies. 	Inter-agency information sharing (e.g. networking). 	As needed, often informal, interaction, on discrete activities or projects. 	Organizations systematically adjust and align work with each other for greater outcomes. 	Longer term interaction based on shared mission, goals; shared decision-makers and resources.	Fully integrated programs, planning, funding.

- Have collaborative members individually assess where they think the collaborative is on the spectrum
- Are you all in the same place or in different places? Do you want to move to a new place?
- Have a discussion about this.



The Collaboration Spectrum Worksheet



CURRENT LEVEL OF COLLABORATION:

Place a **blue dot** on the Collaboration Spectrum to indicate the **current** level of collaboration regarding our issue. Jot down a few points about how you reached your assessment: What are you seeing/not seeing?

IDEAL LEVEL OF COLLABORATION:

Place a **green dot** on the Collaboration Spectrum to indicate the **ideal** level of collaboration that you would personally like to see. Jot down your thoughts and ideas regarding your assessment.



TOOL | Top 100 Engagement Worksheet

There are three pre-conditions of Collective Impact: Influential Champions; Urgency of Issue; and Adequate Resources. Together, these 3 pre-conditions identify three community elements that determine the success of a Collective Impact effort. A good assessment of these conditions enables groups to undertake the ground-work needed to build awareness, and ultimately momentum, around its issue.

Tool Description

This tool and worksheet are used to engage participants in brainstorming to identify and prioritize influential champions who could be engaged in the Collective Impact effort and lend their support to moving the effort forward.

Tool How To:

Step 1 — Invite participants to spend a few moments individually brainstorming names of individuals who they know and think would be helpful in moving the collective effort forward. Place each name on an individual post-it note.

Step 2- Using the table below, the participants begin to sort the names into sectors ultimately trying to identify 25 business, government, community or non-profit sector leaders. The participants identify areas of strength (for example lots of individuals identified in the business category) and areas of further work (for example weaker connections to people in government). (5 minutes)

Step 3- The final step is to rank prospective names using the ranking tool. Be realistic about your ability to engage key prospects. The shared ranking is used to enable the group to prioritize who they might next try to engage in their initiative. (7 minutes)

Tool Debrief:

Build a database of those we want to engage. Host conversations for system-wide engagement and develop a communications strategy that keeps them linked to the work.

and develop a communications system that keeps them linked to our work.





Top 100 Engagement Worksheet

Business Sector <i>Share organizations, names and titles</i>	Government or Public Sector <i>Share organizations, names and titles</i>

Citizens/Lived Experience <i>Share organizations, names and titles</i>	Voluntary/Charitable/Non-Profit Sector <i>Share organizations, names and titles</i>

Ranking Our Top 100

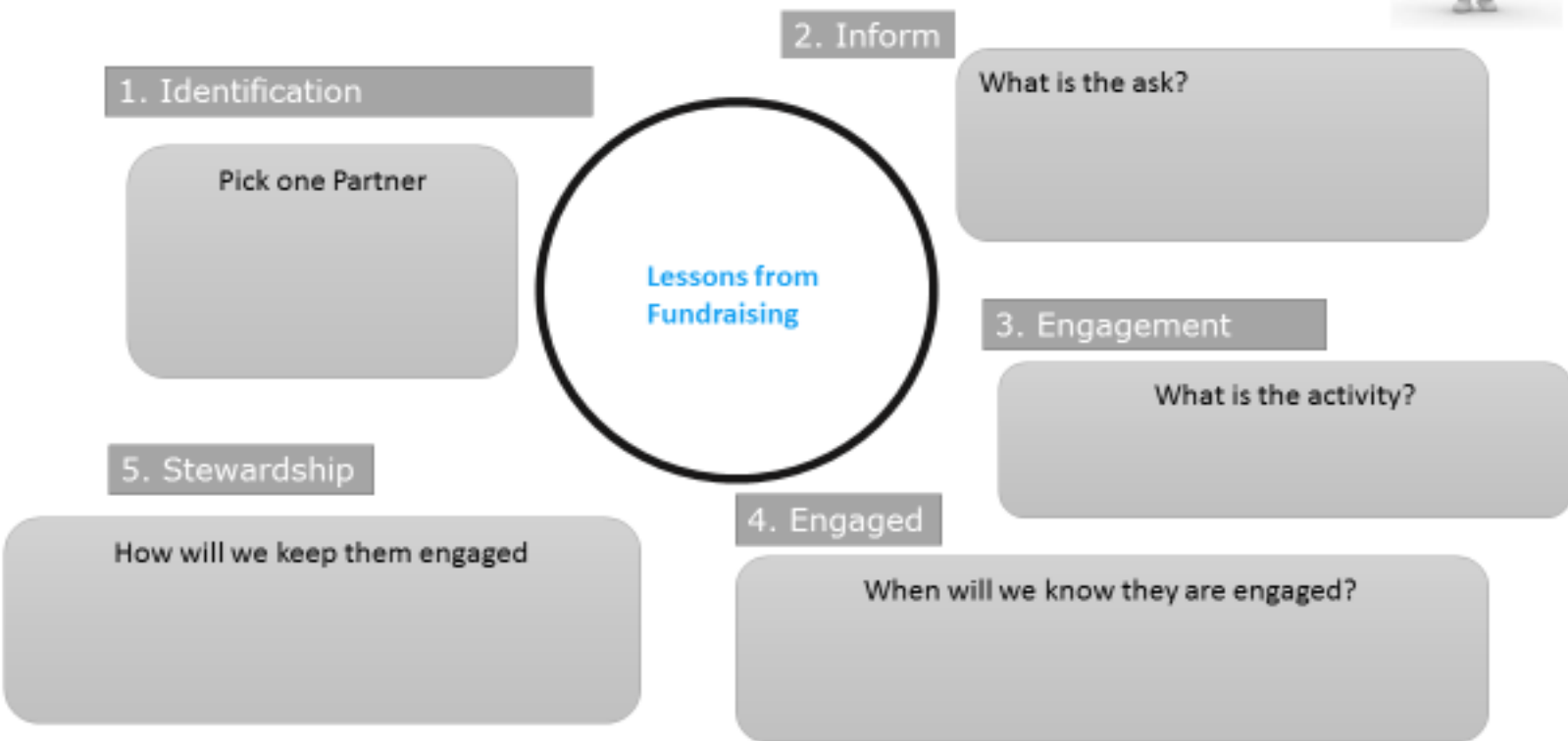
WHO	ABILITY to Help <i>The Reason</i>	ABILITY to Help <i>Ranking</i>	WILL to Help <i>The Reason</i>	WILL to Help <i>Ranking</i>	NOTES

For more information on this tool see **Community Conversations** by Paul Born – pages 117-126.



TOOL | The Engagement Cycle – A Strategic Engagement Tool

The Engagement Cycle





TOOL | The Common Agenda Overview

There are a number of factors to consider when diving deeper to build a common agenda for your community issue. These include:

- Understanding the prior history of collaboration in your community
- Determining whether the issue is pressing
- Understanding what data is required and who has the data relevant to the issue
- Understanding your community context (community system)
- Building a core group of interested individuals
- Recruiting an influential organization to convene community conversations
- Developing a broader community engagement strategy

Many of these factors have initially been addressed in Section TWO: Assessing Your Collective Impact Context which focused on deepening our understanding of the three pre-conditions of Collective Impact.

Beyond a shared vision, a common agenda includes not only a definition of a shared issue that partners across multiple sectors intend to address together, it also includes the partners' shared understanding of that issue; and their agreed-upon approach for how best to address it. Many inspiring common agendas have an aspirational quality in how they are ultimately articulated.

Those working to define a common agenda need to anticipate that the process will be an iterative one. Feedback and input from continuous community engagement needs to be used to assist the initiative's leaders to polish and refine their articulation of the common agenda. Key elements that are incorporated into a common agenda statement include:

- A Description of the Problem (Informed by research)
- Clear (ideally measureable) Goal for Change
- A Portfolio of Strategies that focus on driving large scale change
- A Set of Principles that guide the group's behaviours
- An Approach to Evaluation that frames strategy for receiving and integrating feedback





TOOL | Our Common Agenda Framework

Beyond a shared vision, a common agenda includes not only a definition of a shared issue that partners across multiple sectors intend to address together, it also includes the partners' shared understanding of that issue; and their agreed-upon approach for how best to address it. Many inspiring common agendas have an aspirational quality in how they are ultimately articulated.

Tool Description

This worksheet will help your team get greater clarity about your issue. Work your way around the six stages. At the end of the worksheet, you will find additional reflection questions for your team to consider when building your common agenda.

Tool How To:

Step 1- As a group use the worksheet and talk about each section.

Step 2- Document your answers in the

worksheet.

Step 3- Once the sheet is complete review each section and debrief.

Tool Debrief:

Some suggested debrief questions include:

- What are the implications to your team in working through this Common Agenda Framework?
- What assumptions are we making about our Common Agenda that we will be testing and/or learning more about as our work unfolds?
- What else do we need to know to be able to build our common agenda?





Common Agenda Framework Worksheet

Strategies: 5		Assumptions: 6	
Influential Factors: 4	Problem/Issue/Opportunity: 1		Desired Results (outputs, outcomes & impact) 3
	Community needs/assets/resources: 2		

Source: <https://apps.publichealth.arizona.edu/CHWToolkit/PDFs/Logicmod/chapter3.pdf>



TOOL | Mapping Community Assets

EXERCISE DESCRIPTION:

This worksheet will help your collaborative group to identify the breadth of community services and programs that currently exist to support young children and their families. The community mapping exercise is an important step in understanding what services and programs, both formal and informal, already exist to support children and their families and also identify potential gaps in service delivery. It is also an opportunity for the collaborative group to identify how each member is connected to this network of community service or programs and/or where there might be connection gaps.

EXERCISE HOW-TO:

1. Provide each member of your collaborative network with 10 -15 post it notes.
2. Invite participants to spend a few moments individually filling out the post it notes identifying community-based, state and federal programs and services that are supporting children and their families. Separate post it notes should be used for each program or service.
3. Each post it note should contain the following information:
 - Name of the program or service
 - Who the program serves: specific population
 - Notes about the program or service
 - Connection of the collaborative to the program or service
4. Once the individual participants have completed their post it notes, gather the group together around a long open wall or multiple flip chart papers.
5. Invite individuals to share the programs and services that they identified.
6. Ask the group to consider how to group these programs and services together. Common groupings might include services of a similar type (ie childcare centres, education programs) or services which support a particular population (ie babies, children to 3 years, parents, etc) or services that deliver a particular program (ie reading programs, afterschool programs).
7. Once everyone has posted their post it notes, as the group to step back and look at the picture as a whole. Ask the following questions:
 - What do you see?
 - Where are our community strengths? Where are our weaknesses?





- If we wanted to improve outcomes for children and their families, where could we start?
- Are there any possible leverage points for us to consider?
- What are the gaps that we see in services and programs?
- What else do we need to consider?

8. Capture the notes from this conversation.

9. Take a picture of the community map. This will provide a good starting point for understanding who is doing what in the community and how the collaborative partners are already connected.

DIVING DEEPER:

Using the community map that has been developed, begin to draw connections between the different programs and services that have been identified.

Making Connections:

- Solid lines between two or more programs or services mean that those programs and services are already connected together and have strong ties (for example: the programs and services share space, or conduct joint activities)
- Dotted lines between two or more programs and services mean that the programs and services are more weakly connected (for example: the programs and services staff might participate on a network committee that meets infrequently)

Geographic Maps:

- Some collaborative tables will identify where community programs and services are in the community on a street or community map. This can help the collaborative understand the specific location of different programs and services and how accessible they might be to clients and stakeholder.

EXERCISE DEBRIEF:

Some suggested debrief questions include:

- What does our community map tell us about how children and their families are currently being supported in our community?
- What additional information do we need (& who should they hear it from)?
- Do we have this information? If not, where can we find it?



TOOL | Shared Measurement Mapping

A rigorous commitment to identifying and tracking our progress using an agreed upon set of shared measures is one of the features that distinguishes Collective Impact from other forms of collaboration. Beyond agreement on a small number of population-level indicators that your Collective Impact effort intends to impact, the condition of shared measurement also requires that the Collective Impact initiative has established systems for regularly gathering, analyzing and making sense of your data.

Tool Description

Collaborative community change efforts are distinct because they involve many partners, engaged at different levels, working toward a shared outcome and measurable progress on a complex issue like poverty or infant mortality rates. Knowing that it can sometimes take more than a year to demonstrate impact on a population-level indicator, it is important for leaders to also consider how other measures can be identified and regularly monitored as “milestones” that demonstrate progress on the journey towards, longer-term, population-level change. This Shared Measurement Tool can be used to generate an initial set of benchmarks or

targets for the work of your collaborative. The Outcomes Diary Tool, another Collective Impact Tool, offers a simple and effective means of monitoring and reporting on our identified indicators of progress.

Tool How-To:

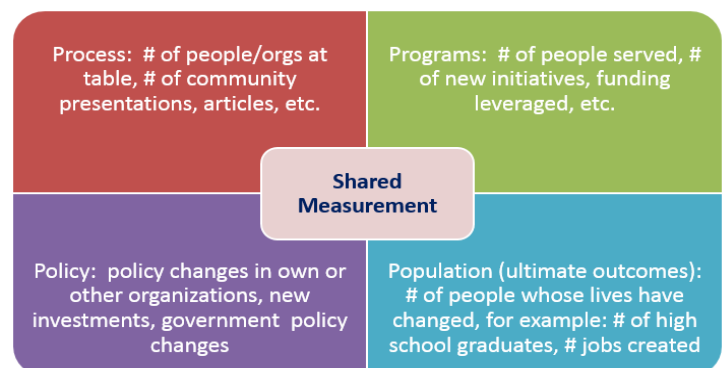
Step 1. – Using your Common Agenda Tool as background, individually or in small groups, brainstorm the measures your collaborative would be demonstrating if you were making progress on your issue.

Step 2. – Use the attached shared measurement worksheet to identify benchmarks for the various progress measures you might monitor to illustrate your progress towards the population-level change your Collective Impact initiative is ultimately striving for.

Tool Debrief:

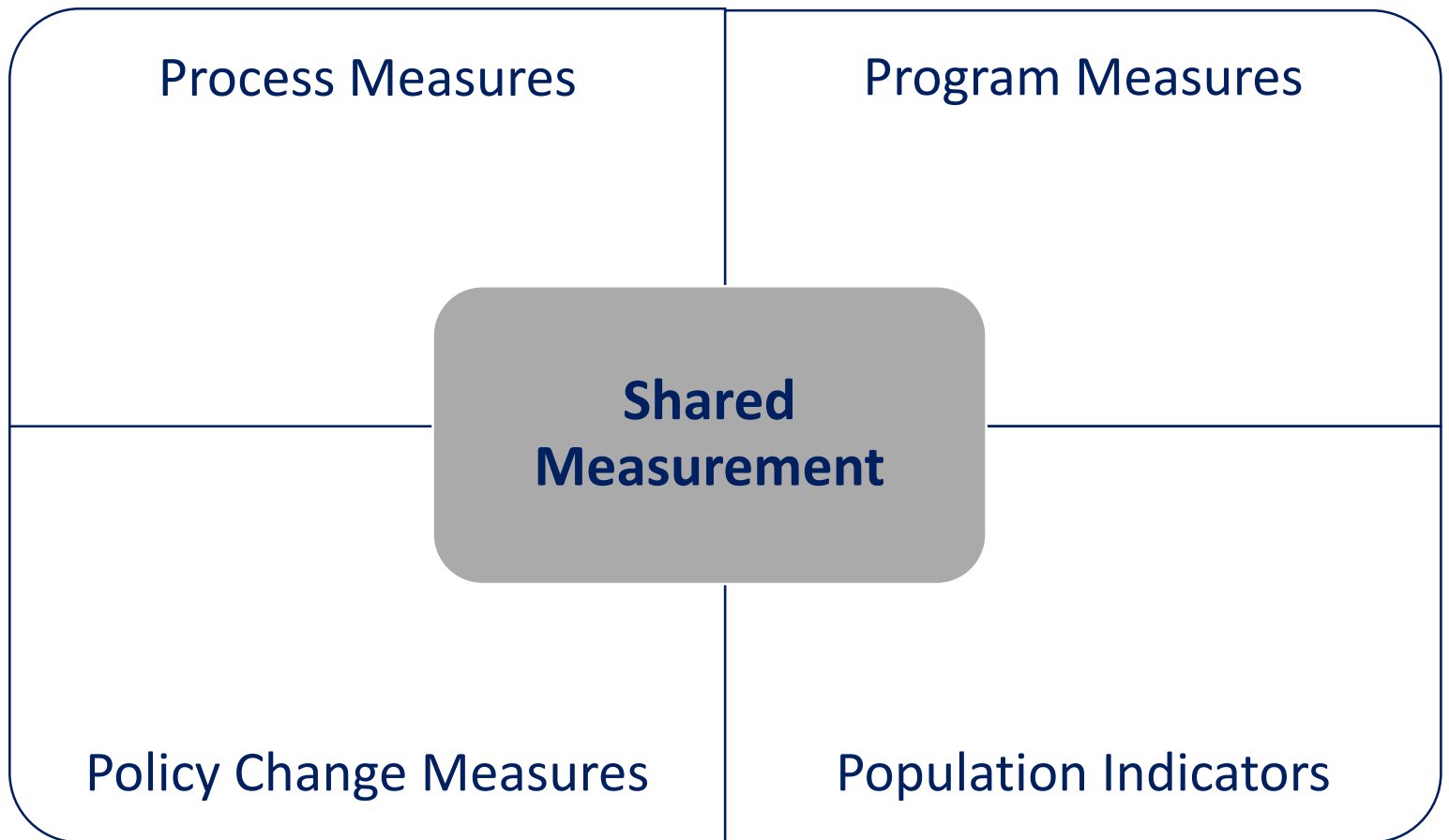
- Generate criteria for assessing potential benchmarks or targets. These might include: correlation to population level impact; ease of monitoring; etc.
- Dialogue and agree on a set of benchmarks to monitor regularly
- Agree upon a process to collect, analyze, make sense of; and, share results of these measures regularly

Our Intended Impact: _____





Shared Measurement Mapping Worksheet





TOOL | Shared Measurement and the Outcomes Diary Tool

Collaborative community change efforts are distinct because they involve many partners engaged at different levels working toward a shared outcome such as moving the needle on complex issues like poverty, homelessness, newcomer integration or environmental change. There is often a convening collaborative body or backbone organization with multiple responsibilities including the engagement of partners, developing and monitoring a change plan, and reporting results.

To effectively monitor changes as they are occurring, a simple tool has been developed called an Outcomes Diary. The diary, developed and used by the Hamilton Roundtable for Poverty Reduction (HRPR), a cross-sector community collaborative planning table, was used to document progress across three domains: changes impacting individuals and families; changes in community capacity and changes in policy and systems.

At regular intervals, HRPR staff would capture shifts occurring in the community from a wide variety of sources. They would document these changes and then develop results reports which were shared with key community partners and other stakeholders. The results of the Outcomes Diary approach to community change enabled the HRPR staff and community leaders to effectively monitor and learn from the constant stream of changes that were occurring.

Sample Template: Documentation of Weekly Results

Outcomes: The benefits or changes for individuals (or populations) after participating in the program’s or organization’s activities (examples: new knowledge, increased skills, changed attitudes, improved job status/income. Be as specific as possible noting dates, numbers and results.

Impact on Individuals and Households

Name of Community Partner	Activity	Outcome	HRPR Involvement

How We Work/How We Work Differently (Community Capacity)

Name of Community Partner	Activity	Outcome	HRPR Involvement



Policy and Systems Change

Name of Community Partner	Activity	Outcome	HRPR Involvement

Key Design Elements for an Outcomes Diary

Framework for Change – The collaborative entity should have a framework describing the key design features of the collaborative.

Benchmarks and Targets – The collaborative should have established benchmarks and targets. These benchmarks will provide a framework for reporting outcomes.

Sources of Information – Sources of information can be diverse and include partner reports, emails, media reports, and data collective from community sources. In recording data in the outcome diary, remember to be as specific as possible including numbers of participants, funding received and dates.

Regular Record Keeping – Establishing a regular reporting cycle ensures that information and results reflect on-going shifts and changes in the community context. A regular reporting cycle also ensures that accurate records are kept throughout the course of the initiative.

Role of Collaborative Organization – The staff of the collaborative or backbone organization takes the lead in collecting and disseminating results.

Partner Engagement – Partner engagement can occur throughout the process through contribution of information, analysis and assisting with the dissemination of results reports.

Patterns and Themes – Regularly reviewing the results will uncover emerging patterns and themes enabling the collaborative table to identify whether it is on course and determine both intended and unintended results.

Reporting – The outcomes diary is an opportunity for the ongoing collection and dissemination of results. Collecting and sharing results with key community stakeholders and partners enables assessing progress and learning from the changes that are occurring in the community.

Reflection Question:

- How can an Outcomes Diary Approach improve collaborative outcomes at LCDS?