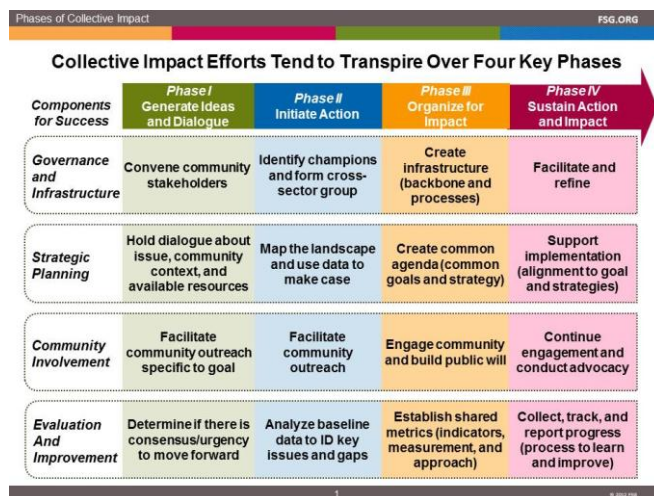


The Effective Backbone Organization

The group was asked to sub-divide into groups according to the level of maturity of their Backbone Organization role as depicted in the visual below and reflect on that phase of the Backbone Organization's role in terms of:

1. What is challenging...?
2. What is missing...?
3. What works well...?



Phase 1: The Idea Phase (pre start-up)

What is challenging?

- You don't know what you don't know- it's a big process "unknown unknowns"
- Priorities and competing agendas- creating common goal
- Clearly defining and narrowing/ have focus/ be realistic
- Building trust
- Reconciling power dynamics- dealing with baggage
- Everyone will tell you what you need to do, but no one volunteers to do
- Laundry lists- but, not necessarily urgent- not genuine/ nor addresses the core issue
- Inclusion; creating equal voice at the table- what if you don't have the strategies to engage- not everyone can participate all the time
- How to access collaborative effort- dialogue about partnerships- about the sidebar conversations, natural steps of process that focuses
- Community gathering- the same always show up- those needed not there so what strategies/approaches, esp. smaller organizations without the resources- sometimes larger organizations too if isn't engaging- rural communities that are scattered over larger geographies without commonalities
- Communities operating in silos: eg. Kids don't play with kids in other communities- finding the "SPARK"
- Dealing with fear- fearing "giving," "having less"
- Facilitating change in behaviour in complexity- ind, org and community level (Book- "switch")
- Setting expectations when building readiness- amount of work to build and number conversations
- Finding line in the sand when to say "good enough"
- Finding quick wins
- Keeping momentum going- as to have different groups at different stages
- Understanding different [layers- their motivations- use the assets and energies
- Making it about what you're doing and not able to specific people/ organizations- "ownership" of process- letting go of actions- not making it dependent on people
- Making engagement MEANINGFUL
- Idea that we need to work on a big systemic change- narrowing to specific chunks, local and immediate; getting those parameters (heart rate)
- Finding \$\$\$\$
- Identifying who needs to be there- KEEPING at table
- Quick ROI

- “Selling” this process, was of thinking- organizations put time limits and pressures
- Election mode- affects timing/ champions not re-elected- not able to commit beyond your team
- Engaging business
- Being able to say “no”- back to focus, expectations, need to take action
- Organizing people to their motivations/needs- different things for different people- people stepping up and spreading work out
- Agreement on milestones
- Legitimacy for decision makers
- Turnover of people
- Participants’ individual challenge within their own organization – e.g. May say yes but organization dysfunctional
- Organizations send individuals who can’t make decision/ can’t move agenda
- Disconnects- volunteers, staff, boards-> role of middle person- board approvals reg;’d
- Practice tells us one thing but we do other
- Understanding limitations of people/organizations around the table
- If you don’t have risk mitigation challenge- getting people to agree to risks (H, M, L) and strategies
- Signing on for the “messiness” and ambiguity (those at the table, those sending people to the table)
- When does the content trump the process?
- Balance- relationship/content/process
- Knowing when need to have people “hit the ground running” vis. On a learning curve (new hire eg.)
- Hidden agendas

What is missing?

- How to identify the appropriate convenor
- Identifying the right leaders to begin the process
- Identify the community issue; “The buzz”
- Decide which organizations are the best drivers for change
- How to be intentional about authentic community engagement
- Need to acknowledge risk and uncertainty to and for all stakeholders
- How to be clear about individual agendas and mandates in order to establish transparency and to foster trust amongst diverse stakeholders
- Building in the time for actors to get to know each other: skills, gifts, talents, and experiences
- How do we deal with the tension of being the convenor without being the driver/leader
- How to establish shared leadership on the front end- level playing field
- How to communicate the value of collective impact to new audiences
- How to create community champions
- How to suspend/integrate and communicate tension between process and action
- Begin establishing values and principles
- Create ceremony and process to re-ground in purpose and vision

What works well?

- Engaging Community Conversation
- Having a specific goal
- Core group of engaged and dedicated people
- Thoughtful value proposition (what’s in it for them)
- Having small win/ win situations right away
- Appreciate and understand that you have to give up a part of yourself to be a part of something larger
- Never a lack of creativity...it needs to be funnelled together
- Establish common ground and shared value
- Acknowledge time for self-reflection at beginning

- Establish network co-ordinator
- Horizontal structure- not hierarchical
- Spend time on relationship and trust building
- Having a good time- shared knowledge- consensus building process
- Identify who should be at the table
- Baseline questions and clarity
- Be open and invite unusual suspects
- Emergent themes- common themes
- Move from public knowledge to expert knowledge
- Building readiness and interest and understanding of knowledge
- Get going!
- Quick wins, then build sustainability with structure
- Having a coordinator/ keeper- not off the side of their desk
- Requires dedicated money (resources)
- Engage volunteers- demonstrate to rest of community
- Put the “right” people on the “right” bus in the “right” seats
- Identity different leaders at different stages
- Housekeeping piece is very important
- Leadership different from management
- Servant Leadership
- Open and non-structured leadership
- Willingness to have many leaders
- Timeliness
- Having a deliverable at the end- that everyone works towards
- Don’t jump ahead before you are ready
- Recognize the reality
- Alignment of purpose with funder
- Model for collaborative process- comprehensive
- Partnership commitment
- Having people/ organizations at the table with flexibility within their structure
- Commitment by convenor
- The key players turning into backbone
- Go in with an open mind to not only problem, but also solution
- Don’t have pre-determined end-point
- Use outside facilitator with reputation of legitimacy
- Knowing the territory and reality
- Identify and engage real, grass roots community leaders
- Looking at “leaders” differently
- Ability and structure to communicate

Phase 2 – The Idea to Formation Phase (start-up to Year I)

What is challenging?

- Data: conflicting base line data, sharing data systems, technology, systems, language/definitions
- Choosing indicators- agreement
- Working across systems- Collective timelines
- Creating urgency and shared momentum
- Evaluations: getting to shared metrics
- Leadership: wisdom, influence
- People: Key messages, communications

- Governance- how do we work together? Maintaining group expectations
- Turn-over, Sharing work load, Leadership blocks Silos
- Barn Raising
- Common goals/direction
- Trusting relationships to a common goal
- How can organizations support each other? What are our mutually reinforcing activities?
- Training and capacity building
- Leadership and broad community
- Supporting grassroots to have own engagement
- Lived experiences has value
- Accessible + results Approach
- *Diagram- Barn-raising
- Community Involvement
- Knowing right communication tools
- Getting broad input (from stakeholders)
- Using available technology
- Placing value and resources into outreach
- Takes time and \$ constant communication
- Grass roots ambassadors
- Advocacy tools are different from other communications (UP and Out) – (Down and In)
- *Diagram

What is missing?

- Ensuring we have skilled facilitators for conversations, may not be from backbone beyond backbone
- Do we have relevant data? Does it have the right breadth, depth, analysis expertise (interpretation)? Does data assessment need to be in Phase I to determine need?
- Agencies/groups may not have resources to help with data
- Start with what you have
- Skilled facilitators- community champions need to identified, but also build skill and capacity in that champion
- How do we assess capacity for these champions to take this on? (burn-out)
- Leadership- new generation of leaders may not be able/willing to do the same amount of work for \$\$ (or on volunteer) - but not sustainable
- Support for champions (how?) to allow you to shift the needle without them?
- Spreading leadership among many is critical
- Yes, grassroots is great BUT ministry, funder agendas
- What is missing?
- -maybe teach others to become champions? Training the trainer
- Igniting the passion about the cause (more than data)
- -role of communications, data, media, stories
- Definition of data (more than quantitative)
- -sharing stories of CI (quick wins) → and beyond to the “unusual” suspects
- Keeping people as ambassadors when it’s not their agenda
- how you are going to be pooling pulling resources
 - address this, it’s different than a coalition
 - commitment
 - build an understanding that different groups will have different roles → orient people to this, in an ongoing way
 - Celebrate/recognize value all roles
 - Identifying needs (capacity) within groups (varies)
 - Understand, gauge, policy landscape trends (anticipate)***

- Roles=>who can do some of these, who is positioned to advocate and change?
- Evaluation – quantitative evidence, centralizing methods
 - KPI's → indicators
- Using data collection as an outreach tool
- Basic understanding of data, how does it guide us. How do we use it to tell the story NOT use it solely to justify our own position?
- “Naming the Moment” - Friere
- Frontline coming together, deliberately what are learning collectively?
- Interaction
- What to do with the “unreasonable person”? Are we open to LEAP? Transform?
- How to engage → private sector → beyond writing cheque...
- Champion→?
- Shared values?
- Environment → neutral space, new
- Leadership from the side

What works well?

- Community Collaboration- Resonance- social innovation, address poverty, campus/community conversation (shared space- 140 people cross sector with social purpose)
- Impact Café- Talk about data- 1 year of pop level research, Fill it in, tell us the story, focus on parenting your report- conversation (popular)
- Fort Mac- 120,000 people, 127 countries, languages, global construct, seeking local data to get at stories (chunk data)
- Survey monkey- 10,000 members around breast feeding
- Build engagement- build social plan- industry wondering about social data (prosperity wood buffalo)
- Sexual health/ well-being collaborative, Public Health a challenge
- Door to door in Inkster, Human Survey Monkey
- National Alliance for children and youth- ideas, research, pre-existing group has benefits, how do we move to phase III?, go members
- Dynamo: Montreal- 20 days for leaders, 18 people, leadership/bridging- gathering- moving- establishing baseline for leadership
- Collaborative Groups: youth co-created- training parent ed (6 parents), local action group- under drinking (68%), sexual activity decreasing, police, sports and rec., # of parents increased, don't kill the messenger, parents modeled behaviours- cultural shift
- People's group of peers- self policed! Hardcore music- posicore, hoards of teenagers, champions respected different
- Outreach to youth: how do we bring them back in? Shared agenda- many groups, Leadership course, tell stories, key note (big idea)
- Data Sets: consolidated, build conversations (mobilized Res.), analyzed, report: Gap analysis
- Community conversations- leap of faith, 35 schools participated, people will show up
- Voice of lived experience- barriers to access- service providers, in the incubation
- Funder works with you- 70 different groups led to backbone
- Environmental/ social- watershed- sounding board, dinner roundtable: shared thinking, group accelerated innovation, usual suspects
- Scientist- environmentalists, youth, arts
- Invest in incubation- evolve the question---- *diagram

Phase 3

What is Challenging?

- Developing trust amongst the group
- Everyone needs to come to the table without their own agenda
- Having enough staff time to complete tasks (there is so much to do)
- Power issues around the structure
- -Creating the right governance structure is messy. Need the right people
- Setting up agreements at the beginning
- Finding the right people
- To sit at the table
- At the right time
- Need to manage expectations both within the group and in the community
- Determining what public will is
- What model for governance should be used and how to explain that to the network
- How to manage sustainability – ensuring new people have the knowledge
- Defining the role of the lead agency
- Defining goals and then using shared measurement and monitoring system
- Controlling the right size of group and scope of work
- Finding the right balance between service providers and those with lived experience
- What/Who and when do we bring gov't to the table
- Lack of skills around outreach tech (managing tension)

What is missing?

- Define communication strategies
- How will people stay unformed
- COMM. PLAN – cross cutting, in creating common agenda
- Tailored to each stakeholder/group – May apply to each phase
- Establish messages
- Control messages and timing
- Communications committee
- from multiple partners
- cin sponsor/backbone
- Branding/product packaging – common agenda? adaptable
- Language – common (for orgs, staff, boards) consistency in messages – Phase 3, cin dialogue (Phase 1), revisit periodically as develop key messages
- Glossary: Reson C broader audience
- Support partner orgs to make triangle – how to enact common agenda *training (for approaches, language or partners)/develop (for collective impact) mechanism to bring in allies (or overlapping agendas) or align C them rather than compete
- How to position your goals as aligning with their work leveraging and not compete/sabotage (expand/enhance involvement)
- Possibly explore independent model
- Governance Structures
- Concrete examples and how-to's partner agreements – adaptable?
- The 'business' of this work – need to learn from business
- Backbone coming too late – could be the initiator
- Markers in evaluation
- Design
- Metrics

- Methods – asking participant
- Evaluation resistance -- Lack of value placed on data. Lack of capacity.
- How to make it easier.
- Transition from existing group to collective impact
- New players, approach, implications – governance structure
- Letting go or changing partners or roles/responsibilities (Triangle)
- Multiple stages/phases of impact (Phase 3) – multiple projects in larger initiative; all at different phases
- Identifying comprehensive communications and learning from them benchmarking
- Ensuring room for flexibility – allowing shifts, allow for triangling backbones
- Engaging the disinterested (but key)
- Identify barriers and strategies to overcome
- Tool development

What works well?

- ID champion ideas to work to implementation
- Ensure there are early adopters
- Have decision makers
- Have good facilitators and food
- Those experiencing issues “First Voice”
- Have process experts
- Host forums and f. groups
- Have funders at table and actively engaged
- Find balance between funders and participants (address perceived power imbalance)
- Policy shapers and policy makers
- Share widely and deeply
- Involve big “DOERS” in the issue
- Document process and progress of Strategic Plan
- Having process (developmental) evaluation (independent)
- Endorse Backbone organizational establish its accountability
- Who is Backbone? (Clarity and consensus)
- Shared metrics → sharing data and agreements dedicated staff for measurement
- Need research role to inform metrics
- Need clarity about what is attainable
- ID early wins
- ID champion for each indicator
- Capacity assessment survey
- Shared metrics – establish baseline and monitor against it
- Interim measures and re-evaluating is important
- Resources from Tamarack and other networks in communities 0 accelerated process and learnings
- Learn from mistakes
- Provide opportunities for network members to openly and safely share
- Invest in creating “right culture” – planned into meetings (relationship building)
- Transition from planning to action
- Leverage other work
- Experts provide education stimulates engagement and further action
- Have more than one backbone c different roles
- Use “domino” effect for funding → use media to leverage more funds (competition)
- Use online space, easy to use, to share and communicate
- CAIC – Can. Alt. Investment Coop
- Have fun and celebrate often

- Use work as springboard for innovation
- Blend from many models

PHASE 4

What works well?

- Telling the stories
- 4-5 times/year – newsletter, website – members website
- 6 month planning – have a goal... but plan every 6 month activities
- Constantly evaluating “work the metrics”
- Continue to refine focus – “free” training HOWEVER...
- Common vision → relentless, persistence
- Measure
- Document
- Share successes
- Refine
- Re-motivate
- Re-energize
- Continual open, welcoming table “orientation process”
- Every organization ‘signs commitment’ and outlines “roles”
- Develop a team charter – who does what, outcomes, how we walk together
- Created a manual – told the story of the progress – easy for partnerships to understand, buy in
- Annual report card/6 month report card
- Measuring progress (data, stories, etc.)
- Dissemination is important
- Use a leverage tool
- We ask each partner organization annually to provide feedback – activities, increase collaboration, resource commitment
- “open” budget – includes leveraging from others
- acknowledges all partners
- we are all part of the “big picture”
- brought funding to community – funders come to us
- External recognition... “You” are making a difference in the community.. “People” see this and seek “you” out... now considered the experts
- As a result of work have seen shift evolve at organizations at the programmatic level
- Shift in how org’s work – connect at community
 - → System’s shift
 - → “Professionalization” of the work we do – “trusted source”
 - → People’s thinking has change → value shift, across sectors – acting, thinking, growing in new ways
 - → Deepening the impact
- Ability to be nimble
- Respond quickly
- Mobilize quickly
- Have built strong relationships
- Momentum – “drunk the kool-aid” – seeing is showing
- Good strong, trusting relationships continually growing
- Good understanding –mixed, turnover
- Moved past silos – network level → but not yet deeply ingrained in organizational level

- Increase engagement in decision making
- Increase passion
- Increase leadership
- People want to join – becomes a movement
- Backbone culture has evolved over time
- Branded
- Communication strategy on behalf of network
- Everybody can speak, share, “common identity, common outcomes”
- Evaluation framework – collecting data as an organization – strong feedback tool
- Evaluation is fundamental: developmental eval of partnership, framing around learning
- Org’s demanding data, increase expecting, hold each other accountable.

What is missing?

- Creativity
- Data development – concerns
- Innovation and adaptability
- When do you close a backbone organization down? = success
- Transition plan for passing on the role = Change
- Community interest, sustainability
- Integration into the community
- Build capacity for other backbones to step forward – who buildings this capacity?
- Create a 5 year plan
- Resources – Human capital
- Knowledge mobilization
- Specific to data
- Between grass roots and policy-makers
- How to measure the function and resiliency of the backbone organization
- National connectedness
- Issue bank and backbone based
- What’s the collective action?
- Accountability of backbone
- How do you get the community to continue to see the need/value of the backbone?
- Institutional capacity/assessment to evaluate what organization is the right organization
- Who leads the transition plan for changing backbone ownership?
- Type of leadership that works through the phases situational leadership
- Evaluation of the issue and its components?
- Buy in/sustainability
- Celebrate!
- Remember shared leadership
- Capacity building of all your partners
- What to do when two backbones collide?

What is challenging?

- Governance (limits of current structure)
- Power imbalance (funder → agenda)
- Funders/community partners sharing data (policies/confident/fear)
- Deepening vision and learning across partner orgs in face of resources/time/vision challenges
- Negativity → pessimism → fear “what differences does your/our work make?” → people against your mandate
- Politics

- Ongoing accountability
- Losing champions/re-invention
- Communication –how? What? –info overload/fatigue
- Re-alignment of partner’s vision/action plan/internal buy-in
- Sustaining personal engagement in process of backbone leaders
- Honoring partner passion/values
- Competition, jealousy, ego
- A different role needed/expected of backbone leader/group
- Victim of your own success
- False unity
- Mission/vision drift
- Maintaining role in the face of challenges/pressure to change (funders?)
- Are we measuring the right things? Still relevant?
- Transitional role/identity/leadership
- Shifting/course-correcting an approved vision
- Top-down versus grassroots origins
- Turn over = need to educate is time intensive