

# Review of Innovative Models of Collective Planning



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## Introduction

Toward Common Ground (TCG) is a three-year project in Guelph and Wellington funded by the Ontario Trillium Foundation. TCG is a collaboration of 12 community partners taking action to support five collaborative groups to work more intentionally and strategically together to understand, address, and strengthen our ability for meaningful impact on key social issues and within key priority populations. Toward Common Ground collaborators are also tasked with creating a sustainable collective planning model for Guelph and Wellington.

This report gathered information about the following innovative models of collective planning:

1. Child and Youth Network, City of London, Ontario
2. Greater Cincinnati Foundation Backbone Project, Greater Cincinnati area
3. Human Services Planning Board of York Region
4. Living Cities – The Integration Initiative, New York, NY & Washington DC
5. Living SJ, Saint John, New Brunswick
6. Memphis Fast Forward, Memphis and Shelby County, USA
7. Our Kids Network, Halton, Ontario
8. Neighbourhood Development Strategy, Hamilton, Ontario
9. Social Planning Council of Cambridge and North Dumfries
10. Tamarack – An Institute for Community Engagement, Kitchener Ontario
11. West Cheshire Together, West Cheshire, United Kingdom

The term “innovative models of collective planning” (as used in this report) captured a very wide cross-section of examples of how people are working together in their communities to support wellbeing and make population- or system-level change. No two examples are the same and in fact some are very different from each other. The diversity in models included was deliberate to provide varied examples of how organizations or initiatives are structured and taking action to affect meaningful system-level change in their communities.

The purpose of this review is to learn from initiatives and organizations in other communities that are focused on population and system-level issues, change and impact and to use this information to guide and inform the actions we take to move toward common ground in the community of Guelph and Wellington.

## Process & Methods

The Toward Common Ground project manager and the Steering Committee members identified an initial list of Collective Planning Models for potential inclusion in this review.

Information was gathered through three methods:

- key informant interviews over the phone with representatives who spoke on behalf of an initiative or organization (notes were taken during the interviews);
- a review of online content (for example websites and videos); and
- a review of supporting and strategic documents.

Representatives from eight of the 11 collective planning models were sent an email with a request to take part in a phone interview in which they would share information about the work of their organization or initiative. At the end of their interview, each participant was asked whether they could suggest other innovative models that would warrant inclusion in this review.

Most participants shared information about the structure and function of their initiative, alongside key learning and insights from their experience with that particular initiative or collaborative effort. The representatives who spoke on behalf of *Tamarack – An Institute for Community Engagement* and the *Social Planning Council of Cambridge and North Dumfries* also shared information about their organization's structure and function, but their learning and insights focused on more broad trends in collective planning work and the social service sector in general, rather than drawing on their experience from a specific initiative.

The three models that were reviewed using online content only were: *Living Cities – The Integration Initiative*, *Memphis Fast Forward* and *West Cheshire Together*; information from these models was not available under some theme areas. *Living Cities – The Integration Initiative* included an evaluation that identified lessons from the five sites in which they are working. Some of those lessons were included throughout this report, where they were relevant and aligned with what we heard from the other initiatives and organizations included in this review.

A semi-structured interview format was used to guide the key informant interviews and those same questions were used as a template to guide the review of online content and supporting and strategic documents. The information from all three sources was then reviewed:

- for emergent themes under each question; and
- against the key topics included in a corresponding literature review entitled: *Social Service Collaboration and Community Change: A Literature Review for Toward Common Ground*.

Similar ideas were rolled into common themes and shared below with example and quotes, where appropriate.

## Key Themes across Innovative Models of Collective Planning

### Conditions & Precursors for Action

Participants' responses and/or online content revealed six conditions or precursors for action, across the initiatives detailed in this review.

In general, initiatives began for the following reasons or in response to the following community conditions.

1. Limited resources – the acknowledgement of the need to do things better with the same amount of money.
2. Not turning the curve on key social issues, despite significant effort. In one community, they felt they were “under-performing” on key aspects of economic success and quality of life. In another community, social issues were not as high profile as economic issues; an effort was made to use language to connect and understand both aspects of community wellbeing.
3. The need to work together differently. This included the identification of the need for a shared agenda to minimize silos across community efforts; positioning the community to proactively respond to needs; and improving planning and alignment of supports for an identified priority population.
4. The initiative evolved organically over time - both time and community context helped define and shape what these initiatives developed into.
5. Funders and/or government played a role in catalyzing change. In one case, a funder began to convene and later fund several initiatives to work differently. In other examples, the local or provincial government provided direction or leadership. In one case, local government and business partnered to lead an initiative; in other cases, the province gave direction and communities either built a model based on existing community strengths or built something that uniquely fit their community's context.
6. Local research and media attention highlighted struggling neighbourhoods in one community, which led to a localized, long-term response plan.

Regardless of the conditions or precursors for change, the common thread across initiatives and organizations was that groups of people took the responsibility for creating something that fit for and had meaningful impact within their community's context.

### Underlying Assumptions

The interviews and review of online content included gathering information about underlying assumptions that were shared by partners engaging in system and population-level change efforts. When asked, most initiative or organization representatives did not immediately identify a set of underlying assumptions that

guided their work. However, further reflection by the participant and/or a review of online content and key documents found this work is indeed often guided by shared assumptions or beliefs. The underlying assumptions listed below were identified across the initiatives and organizations included in this review, however their inclusion below does not imply that every initiative held each of the individual underlying assumptions that are listed.

1. We can accomplish more when we work together. Collaboration was happening at the leadership level, through working and action groups, and through aligned coalitions. Participants talked about the value of and rationale for working together, in the following ways:

*No single group or individual can address all the needs of any one person or group of people.*

*Collective investment is needed for system change.*

*An integrated approach ensures the most efficient and effective delivery of service.*

*Owning the work together is essential to building a better community.*

2. We need to understand people along a continuum and within their community, social and economic contexts. This included viewing:
  - children within the context of their family and their family in the context of the community;
  - housing as an important first step for people to deal with other issues in their lives;
  - growing economic vulnerability as a threat to long-term health and well being; and
  - a healthy population as the backbone of a healthy community.

One person said:

*A community's health can be jeopardized by a growing number of residents exposed to economic vulnerability.*

3. Limited Resources “force” us to work together differently and better. This included the belief that limits to government funding and community resources made it essential to explore new ways to support neighbourhoods and people, and to avoid duplication of efforts.
4. Empirical evidence is essential. For many initiatives, it was clear that research and sound data were highly valued and significant effort went into gathering, interpreting and applying research and data to inform effective planning and

meaningful action.

## Purpose

It is important to be clear about the purpose or focus of collaborative work. Two key themes emerged in this area.

### 1. Be on the same page.

It is critical that everyone involved in a collaborative effort to effect population or system-level change has a shared understanding of the vision, direction, priorities, target population, what the group is trying to change, how the group intends to take action and the roles of people involved.

When participants talked about a shared vision or direction they said:

*Shared vision is critical and keeps us focused.*

*Our shared vision held us together.*

*[When you have] specific community results to focus the conversation. [It's] easier to stay on track.*

Others identified how important it is to have a shared understanding of what is being changed.

*What is the problem we are trying to solve? When we don't clearly define the problem, we get into trouble.*

*[It's important to have a] shared understanding of the problem and the vision for it.*

### 2. Maintain a long-term vision

With a shared vision established, it is important to commit to the long road to meaningful change. In one example, it took four years to plan and “think things through”. Participants in this review talked about what is required to work toward “system-change” or changing “core or population-level outcomes”. One person said:

*Changing core outcomes is hard work.*

The Integration Initiative Evaluation identified the following lesson:

*System change work requires patience —it may take many years of foundational work before population-level outcomes are realized.*



One person said:

[This work requires] *relentless persistence and commitment*.

## Functions

The initiatives and organizations included in this review each carried out a unique set of functions. In some cases functions were similar across models and in other cases they were quite different from model to model.

Collectively, the initiatives carried out the following functions:

1. Conducted social research and evaluation.
2. Provided technical support and/or education. For example, some initiatives or organizations provided training or support for evaluation and capacity building.
3. Supported integration, coordination, contextualization and alignment. Some talked about this function as providing a “bird’s eye view” for a community or taking on the role of “dot connector”. Examples of supporting integration and coordination included:
  - identifying and naming opportunities for enhanced integration and coordination across backbone organizations for example: communications, co-location, data purchasing, collection and analysis;
  - identifying and naming like issues that crossed neighbourhood boundaries; and
  - coordinating partnership at a “strategic or operational level”.

At the same time, it was important to support contextualizing and alignment through enhancing the understanding of the:

- system of supports and services in a particular community;
  - multiple sectors that play a role in the system that supports people’s social and health needs; and
  - intersection between the vision and direction of communities, the province they are situated in, the policies and strategies that impact them, and the data and information that identifies a community’s strengths and needs.
4. Facilitated a community of practice. One organization brought together seven existing collaborative groups to learn from and with each other, while at the same time providing a place to identify opportunities for more integration and coordination.

5. Provided funding. Some initiatives included in this review provided funding to support and/or enhance collaborative work. Funding was provided:
  - alongside multiple funders;
  - through grants and debt financing;
  - as part of a communal pot that included contributions from other organizations. This included coordinated pooled funding efforts for specific programs and strategies; and
  - as part of a commitment to support both human and financial resources.
6. Provided “backbone” support to other collaborative work. For example, one organization supported the creation of new governance structures for existing initiatives and worked with existing initiatives to identify strategies and approaches to achieve system change.
7. Conducted community engagement. Engagement of Key Stakeholders occurred on an ongoing and as needed basis. Ongoing engagement was through participation in a given aspect of the initiative and as needed engagement was deliberate consultation with key stakeholders to inform the direction of an initiative.
8. Hosted annual events to draw attention to core community issues. For example, one organization hosted an annual Poverty Symposium.
9. Collectively planned for community needs.
10. Worked with communities to develop localized action plans.
11. Incubated ideas to support innovation.
12. Created community-wide, overarching or cross-sectoral strategies. One community created a “roadmap” to reach core community outcomes.
13. Facilitated collaboration. Most (not all) initiatives or organizations supported or were themselves, collaborative efforts.
14. “Held” the shared vision.
15. Built awareness.
16. Advocated to municipal or provincial governments.
17. Improved access to services.
18. Enhanced efficiency and effectiveness in human services.

The Living Cities Integration Initiative evaluation identified three pathways towards enduring system outcomes:

- **Deliberate system change strategies** that are designed as *part of the initial approach of the Initiative* and *lead to policy and practice changes*;
- **Changing system dynamics** that lead to the *emergence of policy and practice changes*
- **Emergent strategies** that lead to system outcomes when sites pivot or shift their work.

## Structure

The structures of the models included in the review also varied from model to model. All initiatives or organizations were deliberate about creating a structure that reflected the unique needs of their community. A strong structure was important as well as a willingness to shift the structure to strengthen work and/or to respond to a changing local context.

The initiatives or organizations included in this review were one of the following:

- housed or imbedded in a department in a municipal government;
- a stand-alone not-for-profit with an independent Board of Directors;
- hosted at a local agency with finances overseen by another agency;
- a Partnership with business;
- collaborative groups co-working in a shared space; and/or
- a collaborative initiative that included one or more of the following:
  - a leadership group or steering committee;
  - committees or processes that engaged people with lived experience;
  - backbone-support; and/or
  - working or action groups.

## Agree-upon Lens or Framework

When initially asked if their initiative or organization had an agreed-upon framework or lens to guide their efforts or direction, most participants said they did not. Upon reflection by the participant and/or a review of online content and strategic documents by the researcher, it became clear that some initiatives and organizations had indeed either agreed upon or were exploring an identified lens or framework. The list below is very diverse and includes items that could be called a lens or framework, but also items that might be better identified as a model, tool or approach. These are the ways that the initiatives or organizations are supporting shared language and understanding and in some cases supporting shared processes.

- Building blocks to thriving children

- Canadian Index of Wellbeing
- Collective Impact
- Community and individual resiliency
- Complete communities
- Developmental Assets
- Domains of Wellbeing
- Ecological Systems Theory
- Identified areas of focus that were considered foundational to the work
- Results-Based Accountability
- Social Determinants of Health
- Sustainable Livelihood Framework

### **Membership, Partners & Engagement – Themes & Practices**

Initiatives and organizations included in this report were deliberate about how they identified and engaged partners and key stakeholders. Themes or practices around engaging partners, participants or key stakeholders within the work of an organization or initiative, included the following:

1. In general, initiatives or organizations were deliberate about engaging participants or stakeholders from multiple sectors and diverse areas of experience and expertise. Meaningful engagement was often a key component of an initiative's success and momentum. Key stakeholders varied across initiatives, however they usually included a subset of representatives from: public sector, private or business sector, nonprofit organizations, government, police, school boards, business, priority neighbourhoods, social service agencies, health agencies, university and community college, and/or people with lived experience or other community volunteers.
2. Partners were asked to participate based on their identified expertise, background, experience or knowledge in a given sector. Sometimes the initiative or organization representative identified specific key stakeholders or voices that they wanted to include in their work and actively sought participation from these partners.
3. A priority issue or population of focus was identified and potential partners were given the opportunity to self-select. In these cases, potential partners were given an open invitation to participate and left with the decision about whether there was value in giving their time and/or resources to the collaborative effort.
4. Participation occurred in a variety of ways and required varying levels of time and resource commitment. Partners participated as part of a(n):
  - governance structure of an organization or initiative, for example as a board or steering committee member;

- working or action group;
  - broader or aligned collaborative efforts that had its own separate structure;
  - community advisory committee;
  - neighborhood-level planning groups; or
  - engagement opportunity that arose in response to a specific need or in an effort to gather directed input or feedback.
5. When considering membership, attention to leadership was important. For some initiatives and organizations, influential partners, senior leaders and/or champions were key to their success and momentum. When working collaboratively to effect system change, it was important that these partners were flexible and able to adapt and evolve. People talked about this as:
- being as nimble as possible within a constrained environment;
  - participating in an evolving process – *we didn't know where we were going*;
  - starting small and building on successes; and
  - a culture of risk-taking.
6. Engaging the private sector was important and sometimes challenging. However, in some cases, representatives from the private sector were active partners in or even catalysts for meaningful action in response to social and health needs. Suggestions to engage representatives from the private sector, included:
- make issues and needs as clear and concrete as possible;
  - identify measurable results;
  - be explicit about what is being asked for: money, time, leveraging networks or relationship, a specific expertise; and
  - be deliberate about deciding whether to engage small business or large corporate partners.
7. Some participation principles were not explicitly named, but were drawn from the conversations with initiative or organization representatives or a review of online content. These included:
- inclusivity - Invite everyone to participate;
  - strategic participation - Identify key stakeholders that bring key knowledge, expertise, experience and/or skills;
  - ask organizations not people to commit to the collaboration; and/or
  - a reputation for having impact will lead to meaningful and widespread participation.

The following suggestions and lessons learned also emerged from conversations and reviews of online content. In general, the message was clear: it is important to be deliberate about having the right people at the table; engagement, relationships and

champions are important considerations.

1. Be deliberate about who the stakeholders are and their role. Participants said:

[Ask the question:] *Do we have the right people in place to help us move forward?*

The Integration Initiative Evaluation had two suggestions in this area:

*More attention should be paid to the role of stakeholders at the table.*

*System change requires multiple levels of engagement—from elected officials down to the boots on the ground.*

2. Name reciprocity of commitment.

[Participation could be a] *great personal development and networking opportunity.*

3. Pay attention to how you engage people with lived experience.

*Include individuals who are living in poverty.*

*Need to have residents at the table. Keep the passion and the buy-in. This is why we're doing what we're doing.*

4. Recognize people for their work and contributions.

5. Understand that levels of commitment may vary across organizations and staff.

6. Foster trusting relationships among partners.

[We need to] *worry about the relationships at all levels. Champions at organizations.*

7. Find and cultivate relationships with champions for this work.

[Find] *champions at organizations.*

*Develop relationships with mayors etc. Look for meaningful conversations. Cultivate champions that help us do that work.*

8. Strong Leadership is crucial.

Some participants felt that leadership by a small core team was critical, as well as alignment with broader community directions or priorities

*Very important to have senior leaders at the table.*

The Integration Initiative Evaluation identified the following lessons:

*Leadership by a small core team of the most involved stakeholders is critical to collective impact work.*

*Alignment with mayoral priorities is required to sustain engagement.*

## **Communication**

Communication was noted as important and at the same time a challenge for many of the participants. Conversations and a review of online content and strategic documents revealed the following themes around communication.

1. Communication is a challenge for most people doing collaborative work. For some it was difficult to figure out how much to communicate; for one participant it was a challenge to communicate effectively across departments; another participant felt they should always be working to communicate more; while upon reflection, another participant said *initially they would have given more attention to communication*.
2. Share this work beyond the people working directly on the project. In particular, one suggestion was to share this work *with people with influence*.
3. Ask partners what information how they want to be communicated with. A representative from one initiative said:

*We are meeting with board members about how they want to communicate. We're asking what do you need from us? What can we do better together? [This will lead to a] greater understanding of board members and personalized approach [to communication].*

4. Make information accessible and available. Ideas about and examples of how initiatives and organizations are making information accessible and available, included:
  - using both formal and informal communication methods;
  - using a combination of paper and online content;
  - creating a members portal for internal partners, as well as a public site. In one example the members portal housed information that is in development (for example: recommendations) while the public public facing site only presented final products;
  - using video and social media as a way to engage people and get feedback;

- creating an annual report;
- updating websites with information about progress, strategies, data, and success stories; and
- connecting aligned initiatives through a centralized site.

The Integration Initiative Evaluation suggested:

- *open sourcing knowledge*; and
  - *owning the knowledge products and actively disseminating findings*;
5. Communication requires investment. Good communication requires an investment in staff time and/or outside support.
  6. Clear messaging is important. Things to consider included how to position a story, developing common messaging and tailoring messages to ensure they were understood by intended audiences.
  7. Create processes that support ongoing communication. In one example, the leaders from a number of initiatives met regularly to *discuss progress, share common challenges, develop strategies, and learn from one another's success and mistakes*.

## **Funding & Resources**

Sources of funding and resources varied across initiatives and organizations. Sources of funding included:

1. Local foundations and funders, such as United Ways and Community Foundations;
2. Municipalities. Sometime municipal partners provided all or most of the funding, other times they were one of a number of funders. When a municipality hosted an initiative, funding sometimes came alongside significant in-kind support.
3. Ontario Trillium Foundation
4. Private or business sector
5. Province of Ontario, this included Best Start funding, Ministry of Children and Youth Services and the Healthy Communities Fund
6. Key Organization put money into a shared pot
7. Various Funders, this included a combination of funding from one or more of the sources listed above

The initiatives received the following types of funding: core or operational, capital, responsive and/or project focused grants.

Human Resources varied significantly across the initiatives and organizations included in this report – from one person trying to accomplish some key tasks off the side of her desk, to a number of dedicated part- and full-time staff.



Financial oversight and structure also varied significantly. In some cases, an independent organization or initiative also had an independent budget with a clear roles and responsibilities for how the budget was set and approved. In most cases, the organization or initiative had ongoing sources of core or operational funding, which they enhanced by pursuing project or other one-time funding opportunities. In one example, the financial oversight was the responsibility of one organization, while the host for the initiative was another organization. This was done deliberately to spread the ownership of the initiative. Another initiative set aside funding for technical support (including evaluation, capacity building and training); this funding was directed based on the shared needs of the collective.

Funding and resource challenges were common. Sustainability was often a struggle for the stand-alone organizations, with infrastructure funds the most difficult to secure. Supports for things like communications or research were sometimes funded on a year-to-year basis making long-term planning difficult.

Suggestions and lessons learned included:

1. Good staff is crucial. It is important to have staff that are:
  - strong and skilled and keep the work on track;
  - socially conscious with a passion for the work;
  - able to support the day to day work; and
  - dot connectors.

The Integration Initiative Evaluation found that:

*[Good staff] provide the connecting glue for the work in the community.*

2. Strong initiative leaders are important.

The Integration Initiative Evaluation found that:

*Experienced senior-level staff with deep engagement in the work are critical to making meaning from site work and developing new frameworks that have relevance to the field.*

3. Administrative supports are important
4. Funding is required to this work well.

*Consider how partnerships can complement or enhance funding.*

*Just in time resources are important.*

## Research & Evaluation

Research and evaluation was valued by every initiative and organization that provided input into this report. Research was used as part of evaluation plans and measurement of impact, but also as a launching point to mobilize key stakeholders around an important issue. Included in this type of research was the creation of reports that presented local data or highlighted local needs, strengths and gaps to make clear a local picture related to an aspect of wellbeing (for example: lack of rental housing, polarity in wealth, root causes of an issue, and the local economic climate). These reports were either intended as call to, or became a catalyst for, action.

The methods used to evaluate each initiative varied. Evaluations looked at process and how partners work together; they included both short-term outcomes and long-term outcomes. Some initiatives identified targets; others identified statements of wellbeing that they worked toward; while others identified a combination of both. In some cases key stakeholders were brought together to identify and prioritize potential measures, while other communities relied more heavily on a group of data experts to identify appropriate measures. In one community each initiative had separate goals and metrics that were tracked, monitored and shared in public reports. Progress toward goals was captured in an individual dashboard and data was aggregated into a publically available macro-dashboard that tracked overall progress.

Indicators were drawn from existing tools (for example the Early Development Inventory), locally-created surveys, information gathered by local organizations or programs and population level data sources (for example Statistics Canada or Employment numbers).

Evaluations that were discussed as part of this review sought to measure:

- process;
- how partners work together;
- short-term outcomes, for example, one evaluation tracked the implementation of a local agreement; another analyzed how well implementation aligned with a theory of change;
- long-term outcomes that reflected community level impact, for example one evaluation looked at how well the initiative was accomplishing goals set out in a community plan;
- the extent to which an organization or initiative was a catalyst;
- health perceptions in neighbourhoods;
- how much a community had changed;
- leverage; and
- how well partners were working together across departments.

A variety of tools were being used to measure impact; they included:

- story-telling of system change – talking about what is being done differently that is leading to change;
- a performance management framework to measure short and long-term progress
- celebrating success along the way;
- a data dashboard with major metrics for all key priority areas;
- Partnership Self Assessment Tool;
- a key milestone report (used also as continuous communication tool);
- department champions used an internal tracking sheet to capture how actions are being addressed across departments;
- template to track neighbourhood actions identified in action plans;
- resident trackers gathered neighbourhood-level data from community members; and
- visually mapping progress.

Some identified challenges related to research and evaluation were:

- The timeframe of an evaluation was not the same as the time needed for meaningful impact to occur. Thus an evaluation may report on process or changes in how a group of people work together, rather than improved outcomes for the identified priority population.
- Measuring the contribution of advocacy in changing policy.
- Connecting or telling a story and making the importance of those connections clear to people.

One of the findings of The Integration Initiative Evaluation was that:

*Developing results is very hard; creating the systems for capturing and reporting the data is even harder.*

Suggestions and lessons learned included:

- Consider a common evaluation framework; at the same time, one community learned that subjectivity and flexibility are also important in evaluation.
- Identify priorities with clear targets; this should be a mix of numbers and statements.
- Strike a balance between accountability and evidence-based results with approaches that focus on evaluating changes in system dynamics.
- Start small and build on successes.
- Data analysis needs to be recognized as a specialized skill-set.
- Celebrate success along the way.
- Capture and share information through annual reports.
- Do not get “bogged” down with measures. Measurement is important, but it is not the sole purpose of the work we are doing.

- Find a keystone outcome. These questions might help identify a key outcome: Is there one outcome that has cascading or ripple effect? Are there outcomes that cross more than one initiative? What is our role versus the role of others? What are pathways we are contributing to? Is there an indicator that shows where two aligned initiatives meet?
- Knowledge creation and knowledge transfer are important considerations.
- How a story is positioned is very important.
- Evaluation should include a monitoring plan.

The Integration Initiative Evaluation found that both qualitative and quantitative data are important:

*Qualitative feedback loops are as important as having a quantitative data dashboard in system change work.*

### **Collective Impact**

Most (not all) initiatives that were reviewed used or aligned with the Collective Impact model. They talked about and understood Collective Impact in a number of ways.

1. In some cases, Collective Impact (CI) was a way to talk about, label, define and understand work that was already happening in a community. In these examples, collaborative work often predated collective impact and a deliberate decision was made to take on the CI language. The 5 tenets of Collective Impact then became the lens and language used to understand and talk about the work.
2. Sometimes Collective Impact was seen as essential in a community's ability to achieve meaningful impact. Some participants felt very strongly about the value of collective impact in their work. They said things such as the following:

*In the absence of collective impact in a given sector, things don't change and move.*

*Collective impact underpins the work of a community or initiative.*

*The initiative was powered by collective impact.*

*Collective Impact moved the work from integration to impact.*

The Memphis Fast Forward website described Collective Impact as *not just a new term for collaboration. Instead, it represents a fundamentally different, more disciplined, and higher-performing approach to achieving large-scale impact.*

3. In some examples, Collective Impact was used alongside other frameworks within initiatives or organizations.

4. More broadly, Collective Impact was talked about and understood as a:

- group of people trying to solve complex social initiatives;
- way to understand our work and get better at it; and
- framework or way of thinking that works.

## Collective Wisdom

Suggestions and lessons learned were incorporated into some of the sections above when they aligned with an existing theme. This section presents the remaining collective wisdom of the voices included in this review; it also incorporates some of the findings from *The Integration Initiative Evaluation*.

The ideas presented below emerged from the following three questions: What is key to doing this work well? What lessons have you learned? What would you do differently? These questions were either asked of participants or used to guide the review of online content.

1. Be deliberate about creating processes that fit for the specific initiative and/or community. This included processes for decision-making and approval, how to design and move forward on an action or new idea and deciding who to engage and when.
2. Create a structure for how to work together. One participant said:

*Structure evolves, partnerships change, engagement changes. It is very important to do the foundational pieces well.*

3. Be strategic. Working together to collaborate in an effective and meaningful manner does not happen by accident. The initiatives and organizations included in this review were strategic in the areas that were important to their community and context. These included: structure, process, partnership, membership, engagement, commitment, language, leverage, and making decisions about where to take action. The Integration Initiative Evaluation found that:

*Complex problems can be addressed through many different strategies. The challenge is not to take on too many, but to identify one or two with high leverage.*

4. Be deliberate about aligning with influential partners/stakeholder. Examples included:
  - alignment of the initiative's board term with the term of the local Council;

- ensuring the initiative was well-positioned and ready when funding opportunities arose;
  - using key people around the table to help to move the work forward; and
  - receiving endorsement from community leaders on priority areas or key next steps.
5. Include and work with people in neighbourhoods.
  6. Commit to do things differently (both in mindset and time-committed to project).
  7. Use language that resonates with and is meaningful for people.
  8. Build on and/or leverage strengths in your community and others. Use other communities as a resource and borrow what they will share with you. Within your own community, build on what already exists and scale up solutions that work. It might be useful to ask the question: what are the leverage points where we can do significant work to make a difference? Start small and build on successes
  9. Use empirical evidence. When you have good research it is much easier to articulate where you are and what you need. Research can set the context to identify critical needs, priorities and appropriate indicators. Good empirical evidence can also assist to identify “under the radar” issues, as well as it supports evaluation of change across time.
  10. Make decisions about backbone support. In some examples, a stand-alone or neutral organization was critical to their success. For other initiatives, backbone support was not necessary in their context.
  11. Identify the connections with aligned issues and work.
  12. Be deliberate about building momentum. Momentum is important in the early stages and along the way. In the early stage, it creates a sense of urgency that something different needs to be done.

*We're doing this because we are not changing our social issues here.*

Success along the way makes people want to “jump on board” and stay involved because they see the value of the work. It is important to seize opportunities as they emerge and sustain momentum. At the same time, there will be people who will embrace the work and others who will not.

13. Build personal, organizational and community capacity. Training and education were suggested and/or being pursued to increase knowledge about or capacity in:

- a specific model or framework to support collaborative work;
  - how to collaborate effectively;
  - community needs, priorities and need for action;
  - different mindsets that support collaborative work, for example how to move from *buy-to ownership, individual programs to system thinking, content to context, positional leadership to adaptive leadership.*
  - practical aspects of human services organizations, for example, sharing resources, co-location, shared professional development
14. A community of practice can be significant value-added in cross-sectoral collaborative work.
15. The local community's unique needs and context defines and refines the work. This includes the issues that are focused on, the goals and/or priorities that are identified, the structure that is created, the process that is followed, the evaluation, the strengths and the challenges.
16. Consider inclusion in your planning and implementation. Inclusion was talked about in a few different ways, including the following considerations:
- provision of food and childcare to facilitate participation in process;
  - creation of a holistic and inclusive framework; and
  - consideration of the role of different sectors: arts, culture, environment and economic.
17. Practical suggestions for launching points for system change included:
- Create a Theory of Change.
  - Create a compelling case for action that drives the vision and implementation teams.
  - Keep the focus and what you are accomplishing, not on the "how".
  - Look at values and principles across groups and identified similarities and difference and how each group is contributing.
  - Name the single most important issue in your community.
  - Create a clear one-page document that describes your work.

## Conclusion

The innovative collective planning models included in this report were built and refined within the context and in alignment with the needs of the communities in which they were developed. From the conditions and precursors for action to the purpose, structure, function, funding and resources, all the way to successes and lessons learned, this report provides diverse examples of what is possible within communities when people commit to making meaningful population or system-level change.

In Guelph and Wellington, we have our own unique context and needs that will determine the direction we take to support and enhance collective planning and impact in our community. We are grateful to the community representatives that spoke with us and told us about the work in their community, as well as the clear online content we were able to review to get a picture of work in other communities. The examples included in this report will give us ideas for what is possible and not possible in our community, help us avoid barriers and guide us in the right direction for success. Ultimately, we will find our own pathway to the collective planning model that is the best fit for our community.



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