Moving from Collaboration to Collective Impact
Designing and Implementing a Strategic Planning Approach for the LC3 Collaborative

Tamarack Institute

Liz Weaver
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Tamarack Institute
LC3 Strategic Plan – Poll

What do you hope to achieve through the LC3 Strategic Planning Process:

1. Develop a strategic plan to guide the next three years of the LC3 Collaborative
2. Clarity about the LC3 Common Agenda and Collective Impact approach
3. Engagement of key stakeholders in developing the common agenda for the LC3 Collaborative
4. Clarity about how my organization can contribute to the impact of the LC3 Collaborative
5. Clarity about achieving long-term sustainability for the LC3 Collaborative
Goals for Today

• Introduction of Tamarack Institute and LC3 Team
• Review of the LC3 Strategic Planning Strategy and Process
• Discussion of the Co-Design approach and identification of the Co-Design Team
• Review of the Deliverables and Planning Schedule
• Next Steps
LC3 Strategic Plan – Constraints and Planning During a Pandemic

- LC3 Collaborative has secured short term funding available to advance the work

- At the same time as the Strategic Planning Process, the LC3 Collaborative will be engaged in an evaluation process

- The strategic planning process will occur during the pandemic and will require the ability to be nimble and adaptive as the future is uncertain

- The strategic planning process will be virtual using digital technology

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Strategic Planning in Disruptive Times
Strategic Planning in Disruptive Times

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


LC3 Strategic Planning Process – Key Design Features
LC3 Strategic Plan – Key Design Features

• Strategic Planning process to take place between December 2020 and July 2021
• Final Report is due in August 2021
• Strategic Planning process to include Collective Impact capacity building
• Strategic Planning process should integrate with the results of the LC3 Collaborative Evaluation

LC3 Strategic Plan Deliverables

• Community Assessment – already completed

• Strategic Plan design and implementation with the focus of developing a common agenda for the LC3 Collaborative
  o Develop a shared and common agenda to identify and address the gaps in the current system of services
  o Identify Priorities for addressing the gaps
  o Build the commitment of partners to providing or enhancing their current programs and services to addressing community gaps

• Identify and develop strategies to sustain the LC3 Collaborative
  o Build the capacity and engagement of partners to the collective impact approach
  o Develop agreement on the structure of the LC3 Collaborative
  o Increase the participation and ownership of partners to the common agenda and core strategies of the collaborative
LC3 Strategic Planning Approach

- Co-design will ensure that the LC3 leadership will be engaged throughout including the decision-making process

- Planning process includes a community engagement phase - each board member will connect with 3 to 5 key stakeholders including potential funders, community leaders and others to share the common agenda approach and key strategies

- Community engagement is core to building a resilient and sustainable collective impact effort

Strategic Planning Timelines

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
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<tbody>
<tr>
<td>January 5, 2021</td>
<td>LC3 Collaborative Board Meeting</td>
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<tr>
<td>11:30 – 1:00 pm MT</td>
<td>• Present Strategic Plan Design and Deliverables</td>
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<td>• Obtain agreement on design and process</td>
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<td>• Engage the Strategic Planning Design Group</td>
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<tr>
<td>January 21, 2021</td>
<td>LC3 Collaborative Meeting</td>
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<tr>
<td>11:30 – 1:00 pm</td>
<td>• Present Strategic Plan Design and Deliverables</td>
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<td>• Deliver a Collective Impact Capacity Building workshop</td>
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<td>February 2021 – dates to be determined</td>
<td>LC3 Collaborative – Strategic Planning Sessions</td>
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<td>• Host two interactive sessions to review progress to date and develop a common agenda for the LC3 collaborative</td>
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<td>March 2021 – date to be determined</td>
<td>LC3 Collaborative Strategic Planning Design Group</td>
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<td>• Meet with the Strategic Planning Design Group</td>
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<td>• Review results of the strategic planning sessions to date</td>
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<td>• Determine engagement of external stakeholder or other lead partners</td>
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<tr>
<td>April 2021 – date to be determined</td>
<td>LC3 Collaborative Board Meeting</td>
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<td>• Present results of the strategic planning sessions and Design Group engagement</td>
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<td>• Review and revise results</td>
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<td>• Build an implementation pathway and a Plan on a Page for the Collaborative</td>
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<td>May 2021 – on-going through May</td>
<td>LC3 Collaborative Board and LC3 Collaborative Strategic Planning Design Group</td>
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<td>• Socialization of the LC3 Common Agenda and Plan on a Page with key strategic partners</td>
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<td>• What works? What role could you play? Where might we look for funding and investment to action this strategy?</td>
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<td>June 2021</td>
<td>LC3 Collaborative Board and LC3 Collaborative Strategic Planning Design Group</td>
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<td>• Identify key themes from community engagement process</td>
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<td>• Develop a strategic plan implementation process</td>
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<td>July 2021</td>
<td>LC3 Collaborative Board and LC3 Collaborative Strategic Planning Design Group</td>
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<td>• Tamarack develops and presents final report to the LC3 Collaborative Board of Directors and Strategic Planning Design Group</td>
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Strategic Planning through Co-Design

LC3 Strategic Planning – Tools

• Tamarack will use a variety of online tools during the strategic planning process to make the experience lively and engaging

• These tools include: polling, digital whiteboards, small group dialogues and facilitated conversations

• As well, we will engage LC3 key leaders to ‘socialize the strategic plan’ with community influencers and other partners using a plan on a page approach
Co-Designed Planning Example – Equally Well New Zealand

What was accomplished

Short term Priorities

Co-Designed Planning Example – Healthy People Healthy Places, Sewall Foundation

What kind of community is L-A?

Lewiston-Auburn is:
  • Diverse, vibrant
  • Struggling, divided
  • Resilient, mistrustful
  • Desire to work together
  • Curious, open-minded

We make change through:
  • Ordinary heroes
  • Building relationships
  • Collaborating
  • Long-term perspective and engagement

L-A cares about:
  • Housing
  • Equity racism
  • Youth leadership
  • Trauma
  • Collaboration
  • Health

Lewiston-Auburn as a “Twin Cities” community
  • Schools & Municipal agencies
  • Employment & economy
  • Health & human services
  • Natural & built environment

Sewall wants to:
  • Advance the well-being of people, animals, and the environment in Lewiston-Auburn
  • Support deeper equity with and among community partners
  • Raise community voice and participation
  • Use grants and other strategies

SUPPORT COLLABORATION

Housing

Health & Wellness

Equitable Food Systems

Workforce Access & Economic Development

SUPPORT COLLABORATION

Equitable Systems & Civic Engagement

BUILD CAPACITY

SUPPORT COLLABORATION
Co-Designed Planning Examples – Plan on a Page – Communities Building Youth Futures

**Portage la Prairie Communities Building Youth Futures Plan 2020–2024**

**Where We Are Now**

- **28%** of Portage la Prairie students and 25% of our rural neighbour, Stonewall’s students receive
- **4.3%** of Portage la Prairie students use alcohol daily
- **15%** of Portage la Prairie students and 8% of our rural neighbour, Stonewall’s students report smoking

Our Vision

- **Transformational Vision**: A community where youth are supported to thrive and contribute to their full potential.
- **How We Will Get There**
  - Foster strong relationships
  - Enhance community strengths

Discussion:

- What did you like about the proposed strategic planning approach?
- What changes do you suggest?
- How can we make this an interactive and engaging experience for participants?
- What role would you like to play in the strategic planning process?
Moving from Collaboration to Collective Impact

Pre-Conditions of Collective Impact

• Influential Champions

• Urgency of the Issue

• Adequate Resources
### The Five Conditions of Collective Impact

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<tr>
<th>Condition</th>
<th>Description</th>
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<td><strong>Common Agenda</strong></td>
<td>All participants have a <strong>shared vision for change</strong> including a common understanding of the problem and a joint approach to solving it through agreed upon actions.</td>
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<td><strong>Shared Measurement</strong></td>
<td>Collecting data and measuring results consistently across all participants ensures efforts remain aligned and participants hold each other accountable.</td>
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<td><strong>Mutually Reinforcing Activities</strong></td>
<td>Participant activities must be differentiated while still being coordinated through a mutually reinforcing plan of action.</td>
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<td><strong>Continuous Communication</strong></td>
<td>Consistent and open communication is needed across the many players to build trust, assure mutual objectives, and appreciate common motivation.</td>
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<td><strong>Backbone Support</strong></td>
<td>Creating and managing collective impact requires a dedicated staff and a specific set of skills to serve as the backbone for the entire initiative and coordinate participating organizations and agencies.</td>
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Source: FSG

### Collective Impact and the Board of Directors

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<th>Category</th>
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</table>
| **Common Agenda** | • Mission Alignment  
• Advancement of issue |
| **Shared Measurement** | • Access to data  
• Share data  
• Contribute to population level impact |
| **Mutually Reinforcing Activities** | • New resources  
• New program opportunities  
• New collaborative partners |
| **Continuous Communications** | • Connected into larger community issue  
• Communicate organizational vision, mission, priorities  
• Community-wide visibility for organization |
| **Backbone Infrastructure** | • Convener of collective impact effort  
• Financial resources  
• Get issue in front of policy makers  
• Member of leadership team |
Collective Impact is Collaborative Leadership

but Working Differently

Four ways Collaborative Leaders can work differently

• Consider who is involved
• Develop agreements on how people work together
• Consider how progress happens
• Determine what type of leadership is required
Mindset Shift: How People Work Together

- Create a common intent
- Structure to take advantage of emergence
  - Collective Seeing
  - Collective Learning
  - Collective Doing

Programmatic Versus Systems Change

- Programmatic interventions help people **beat** the odds
- Systemic interventions seek to **change** the odds

Karen J. Pittman
Co-Founder, President & CEO of the Forum for Youth Investment
Collective Impact through Systems Change

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

Collective Leadership

Positional Leadership + Shared & Adaptive Leadership
LC3 Strategic Plan – Poll 2

How could the LC3 Strategic Planning Process increase leadership engagement and contributions to our shared, common agenda?:

1. Increasing our focus on program level changes
2. Increasing our focus on systems level changes
3. Clarity about the policies, practices and resource flows we are seeking to shift
4. Clarity about the power dynamics and connections we are seeking to shift
5. Clarity about the mental models that are holding our common agenda from having an impact
6. Better defined roles and responsibilities for board members and key leaders of the LC3 Collaborative

Discussion and Questions?
Engaging the LC3 Strategic Planning Design Team

LC3 Strategic Plan Design Team – Roles and Responsibilities

• Oversight of the Strategic Planning Process and Deliverables
• Small Group Facilitation Support during Engagement Sessions
• Review of stakeholder feedback and draft reports
• Report to the LC3 Board of Directors
• Other?
Discussion and Questions?

THANK YOU