Building Capacity for Collaboration & Systems Transformation

Salvation Army Church, Orangeville
January 29th 2019

Your Host

Elaine Capes

DC MOVES Coordinator

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Your Presenter

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TAMARACK: Our Theory of Change

We believe there are **five interconnected practices** that lead to impactful **community change.** We support our learners in the following areas:

Evaluating Impact
How can we identify and amplify what works?

Collective Impact
How can we mobilize collaboration across sectors for systems change?

Community Engagement
How can we bring the right people together in constructive ways?

Collaborative Leadership
What approaches to leadership are required for community change?

Community Innovation
How can we create, test, and scale new approaches?

COMMUNITY CHANGE

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Making Connections

Session Goals

- **Discover the power and possibility of multi-sector collaboration** and discover tools that harness, the shared leadership needed for community change.

- **Cultivate a Systems Perspective** - Discover how to work beyond existing programs and to enhance our ability to impact community issues.

- **Adopt an Innovation Mindset** - Explore how innovation thinking can be used to develop new approaches to address our most challenging community issues.

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Complexity, Multi-Sector Collaboration & Collective Impact

What Type of Problem Is It?

Simple

Making Soup

Right "recipe" essential

Gives same results every time

KNOWN

Complicated

Sending a Rocket to the Moon

"Formulae" needed

Experience built over time and can be repeated with success

KNOWABLE

Complex

Raising a Child

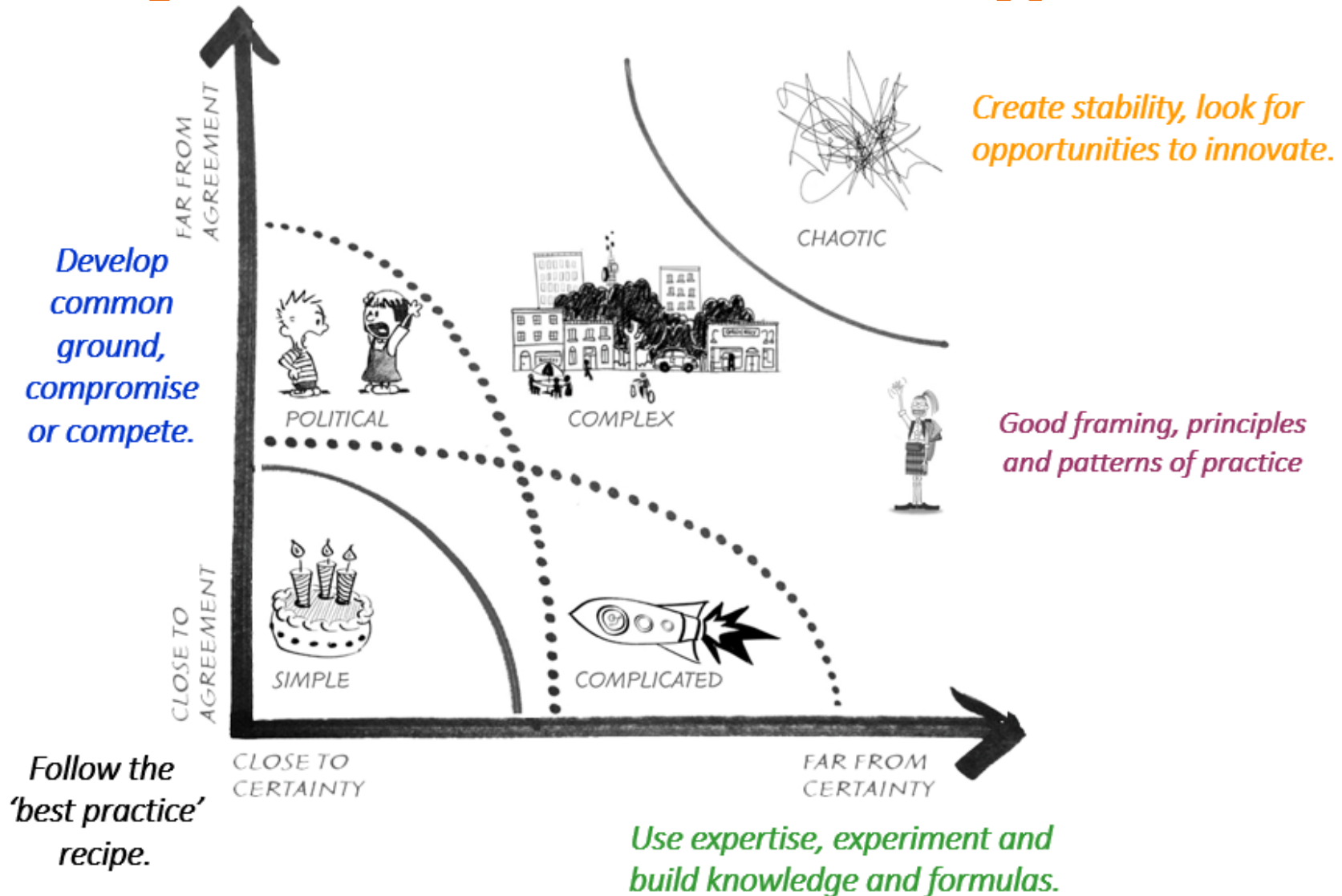No "right" recipes or protocols Outside factors influence Experience helps, but doesn't guarantees success

UNKNOWABLE

Source: **Brenda Zimmerman,** Director of Health Industry Management Program, Schulich School of Business

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The Stacey Matrix: Assessing Your Issue

FAR FROM AGREEMENT

Develop common ground, compromise or compete.

POLITICAL

Create stability, look for opportunities to innovate.

CHAOTIC

COMPLEX

Good framing, principles and patterns of practice

CLOSE TO AGREEMENT

SIMPLE

COMPLICATED

Follow the 'best practice' recipe.

CLOSE TO CERTAINTY

FAR FROM CERTAINTY

Use expertise, experiment and build knowledge and formulas.

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Working With Complex Issues

- Good Framing to make challenges and issues coherent

- Manageable set of principles to guide thinking and action

- Aides for Action/Practices that must be adapted to context

Source: **Brenda Zimmerman,** Director of Health Industry Management Program, Schulich School of Business

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3 Approaches to Working With Complexity

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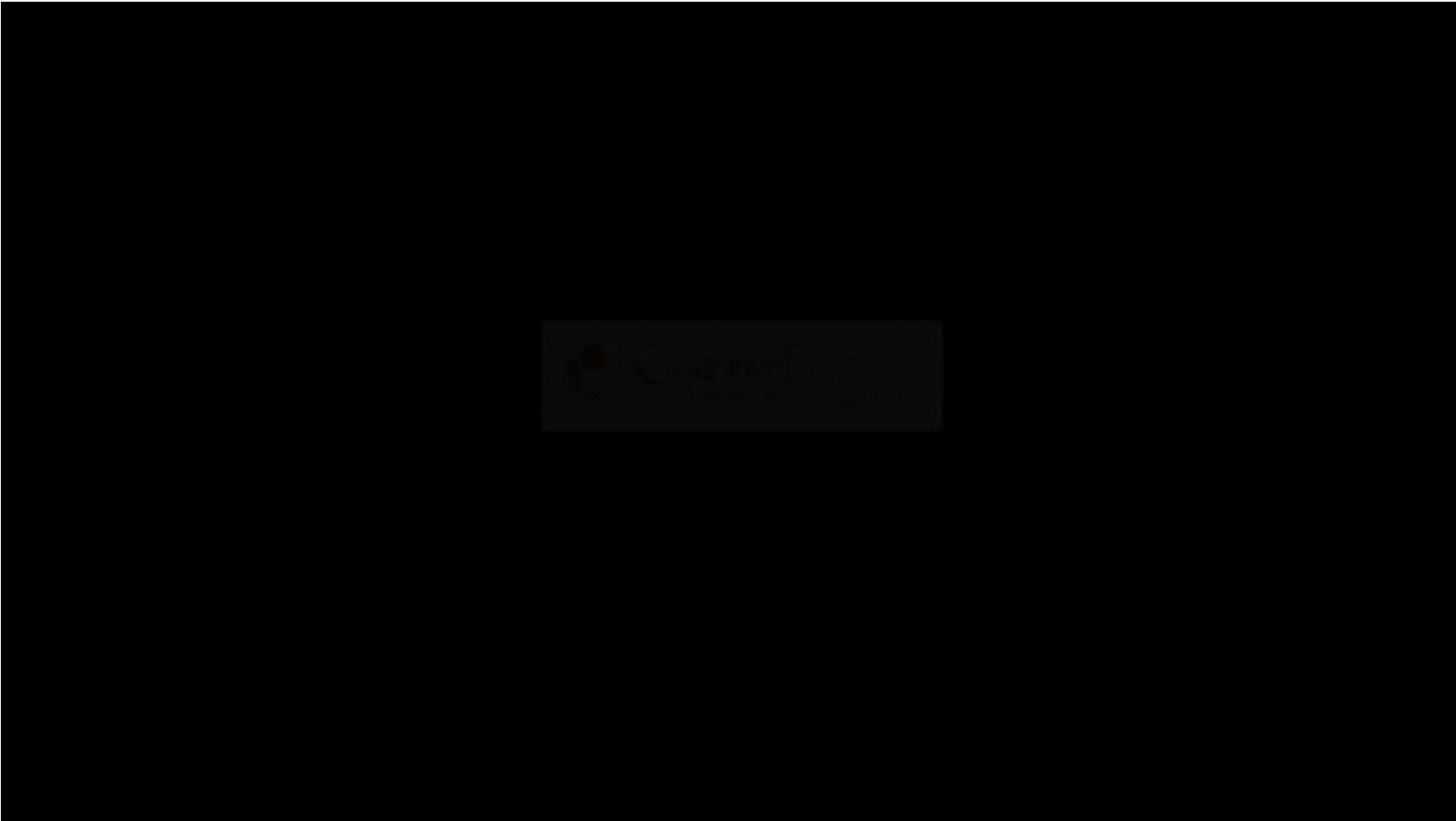
The Strategy Continuum

Emergent Strategies

Innovators experiment with different ways to make progress on desired impact

- Action-Learning
- Human Centered Design
- Safe to Fail Experiments
- Agile Design/Lean Start Up
- Change Labs
- Emergent Learning Tables

Umbrella Strategies

Innovators have flexibility to align their actions to shared outcomes and guided by select parameters

- Framework for Change
- Principles-Focused Strategy
- Strategic Intent
- Boundary Planning
- Outcome Mapping
- Minimum Specifications

Detailed Strategies

Innovators agree to "plan-the-work" and then "work-the-plan" with high fidelity

- Theory of Change
- Multi-stakeholder Results Framework
- Comprehensive Community Planning
- Traditional Strategic Plan

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Navigating Complexity with Simple Rules

Type	Purpose	Example
How-to rules	They spell out key features of how a process is executed—"What makes our process unique?"	Akamai's rules for the customer service process: staff must consist of technical gurus, every question must be answered on the first call or e-mail, and R&D staff must rotate through customer service.
Boundary rules	They focus managers on which opportunities can be pursued and which are outside the pale.	Cisco's early acquisitions rule: companies to be acquired must have no more than 75 employees, 75% of whom are engineers.
Priority rules	They help managers rank the accepted opportunities.	Intel's rule for allocating manufacturing capacity: allocation is based on a product's gross margin.
Timing rules	They synchronize managers with the pace of emerging opportunities and other parts of the company.	Nortel's rules for product development: project teams must know when a product has to be delivered to the leading customer to win, and product development time must be less than 18 months.
Exit rules	They help managers decide when to pull out of yesterday's opportunities.	Oticon's rule for pulling the plug on projects in development: if a key team member—manager or not—chooses to leave the project for another within the company, the project is killed.

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The Case for Multi-Sector Collaboration

- No one sector, working alone can effectively address complex issues

- Complexity is best addressed with a multi-sector approach

- "Context experts" are as necessary as "content experts" in generating effective solutions to complex issues.

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Harnessing Collective Wisdom

The Scallop Principle

- Each one of us is an eye (I); the whole discerns through us.

- The corollary: when we don't hear from any eye (I), the whole is at greater risk.

Stances that support the arising of collective wisdom

- Suspend certainty
- See the whole
- Seek diverse perspectives
- Welcome all that is arising
- Trust in the transcendent

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Collective Impact: A Definition

"A disciplined, **cross-sector** approach to solving **complex** social and environmental issues on a **large scale**."

- FSG: Social Impact Consultants

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Preconditions for Collective Impact

- Influential Champion(s)

- Urgency of issue

- Adequate Resources

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The 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

Diverse Voices * **Responsive** * **Community Aspiration**

Shared Measurement

Collecting data and measuring results consistently across all participants ensures efforts remain aligned and participants hold each other accountable

Exploring * **Alignment** * **Tracking Progress** * **Results**

Mutually Reinforcing Activities

Participant activities must be **differentiated while still being coordinated** through a mutually reinforcing plan of action

Weaving * **System** * **Supportive** * **Centered**

Continuous Communication

Consistent and open communication is needed across the many players to build trust, assure mutual objectives, and appreciate common motivation

Trust * **Transparency** * **Ongoing** * **Engagement**

Backbone Support

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**

Facilitate * **Convener** * **Coordinate** * **Movement**

Source: FSG

Six Additions in Collective Impact to 3.0

Management Paradigm   +   **Movement Building Paradigm**

Specialized Agendas → Common Agenda + Community Aspiration

Fragmented Measurements → Shared Measurements + Strategic Learning (& Shared Measurement)

Independent Activities → Mutually Reinforcing Activities + High Leverage and Systems Focus

Sporadic Communication → Continuous Communication + Authentic Community Engagement

Unsupported Efforts → Backbone Infrastructure + Container for Community Change

Collective Impact...

DOES NOT:	DOES:
• Employ a single organization or sector approach • Focus solely on programmatic outcomes • Work on short term priorities • Resolve simple or complicated problems	• Require a backbone investment to steward the collective work forward • Require diverse perspectives • Use data to inform the issue and outcomes • Focus on the systemic barriers • Leverage policy change opportunities • Leverage existing assets & programs in an intentional and aligned way • Focus collective resources on high impact priorities

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- Comments?

- Questions?

Mapping Current Community Assets

Identify the **projects** or **initiatives** that you and/or your organization are currently working on:

- List **one project** or **initiative** per post-it

- Add **your name** to the post-it and place it on the wall

Woodview Targeted Youth Suicide Prevention Services

**Sarah Precious –
sprecious@woodview.ca**

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Complexity, Multi-Sector Collaboration & Collective Impact
Putting Theory into Practice

Practical Tools to Put Theory into Practice

Find more Tools and Resources at:
https://www.tamarackcommunity.ca

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Multi-Sector Collaboration, Complexity & Collective Impact
The Collaboration Spectrum as a Tool

Trust

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.

Turf

Loose   **Tight**

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Multi-Sector Collaboration, Complexity & Collective Impact
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- Have members individually assess where they think the collaborative **is** on the spectrum (blue dot)

- Have members individually assess where they think the collaborative **should be** on the spectrum (green dot)

- Are you all in the same place or different? Do you want to move to a new place?

- Have a discussion about this.

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Thinking Strategically About Programs *AND* Systems

Programmatic Versus Systems Change

Karen J. Pittman
Co-Founder, President & CEO of
the Forum for Youth Investment

- Programmatic interventions help people **beat** the odds
- Systemic interventions seek to **change** the odds
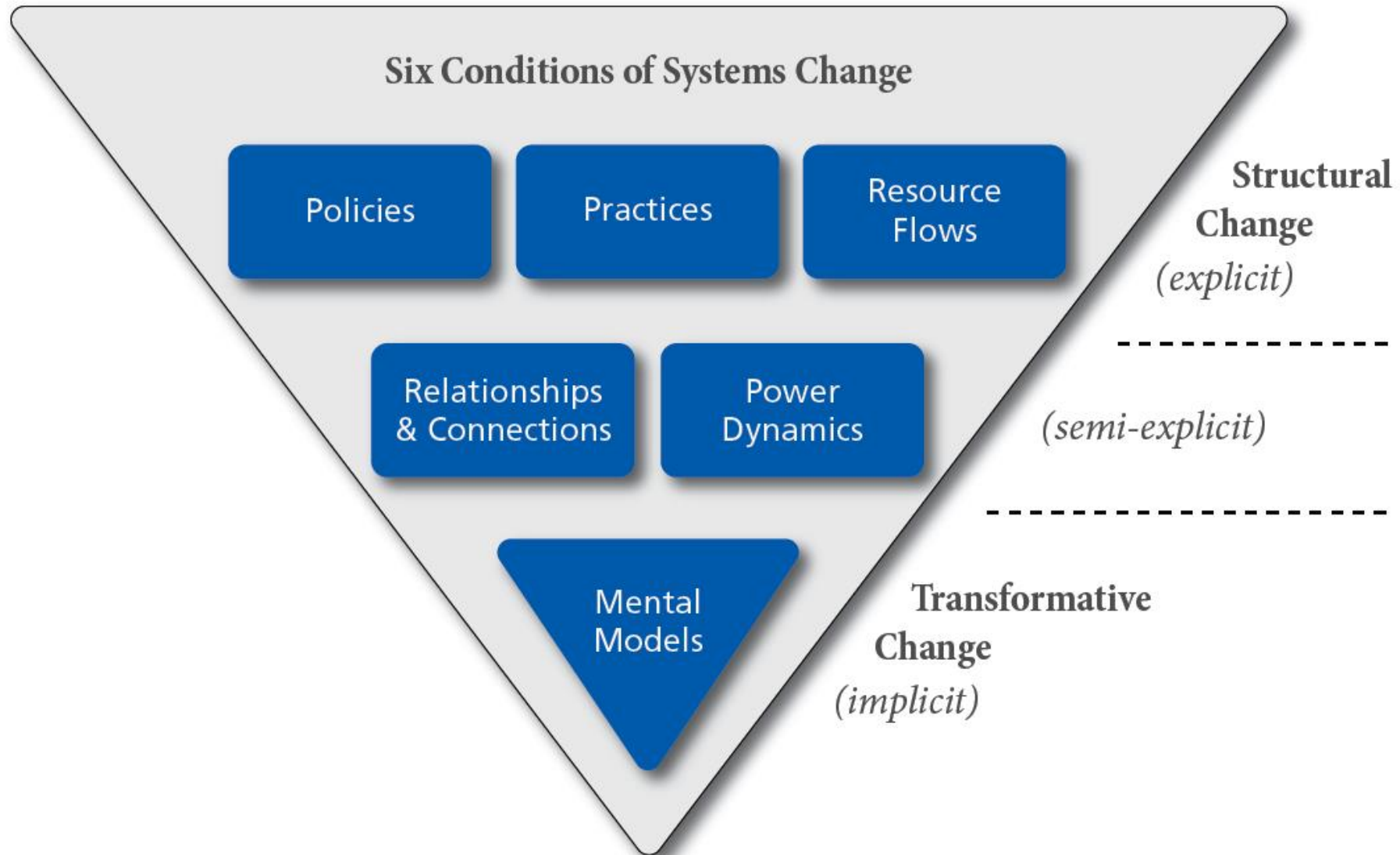
Shifting Our Way of Thinking & Doing

Traditional Response
Programmatic Responses and Results

Systems Response
System Level Change and Results

Community Outcomes
- Affordability
- Safety
- Access to Programs and Services
- Connectedness and Inclusion
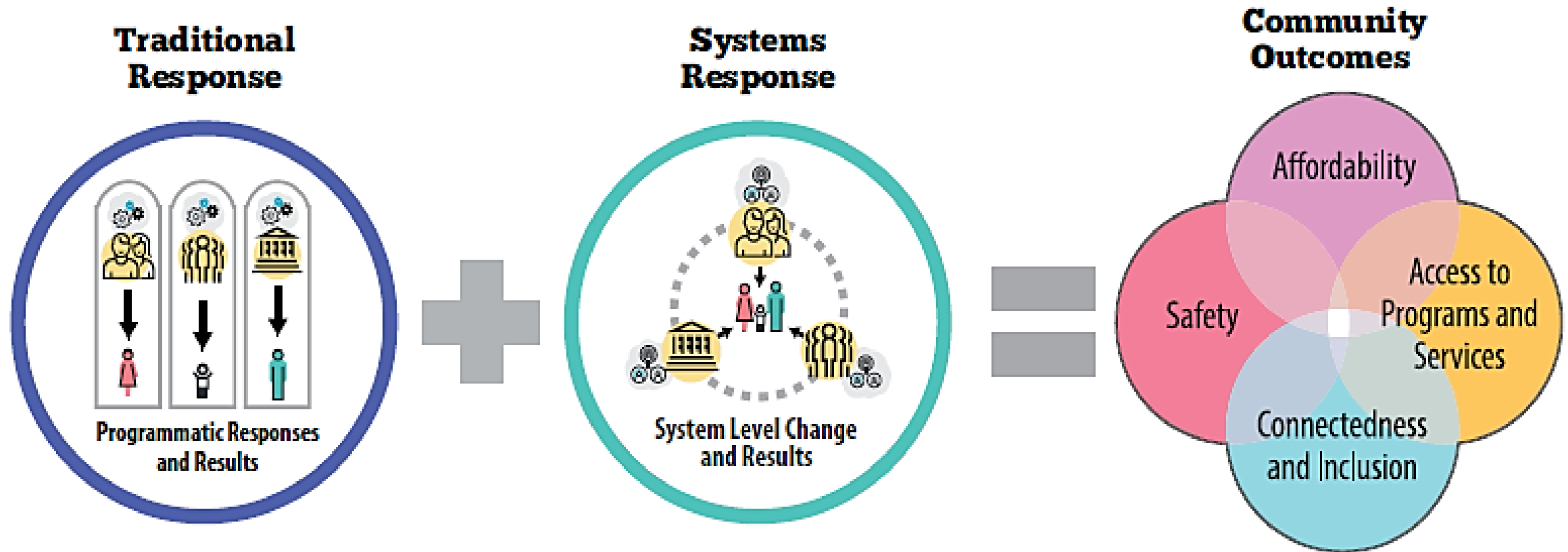
Source: *Strathcona County Social Framework*

Addressing Complex Issues at Scale

Interventions

Programmatic Outcomes

Programmatic Interventions
(Tangible, Direct, & Immediate)

SMALL CONTRIBUTION

Population Level Outcomes

Scaling Up, Out & Deep

Systemic Outcomes

Overall Strategy

Systemic Interventions
(Broader, Less Direct, Long-Term)

LARGE CONTRIBUTION
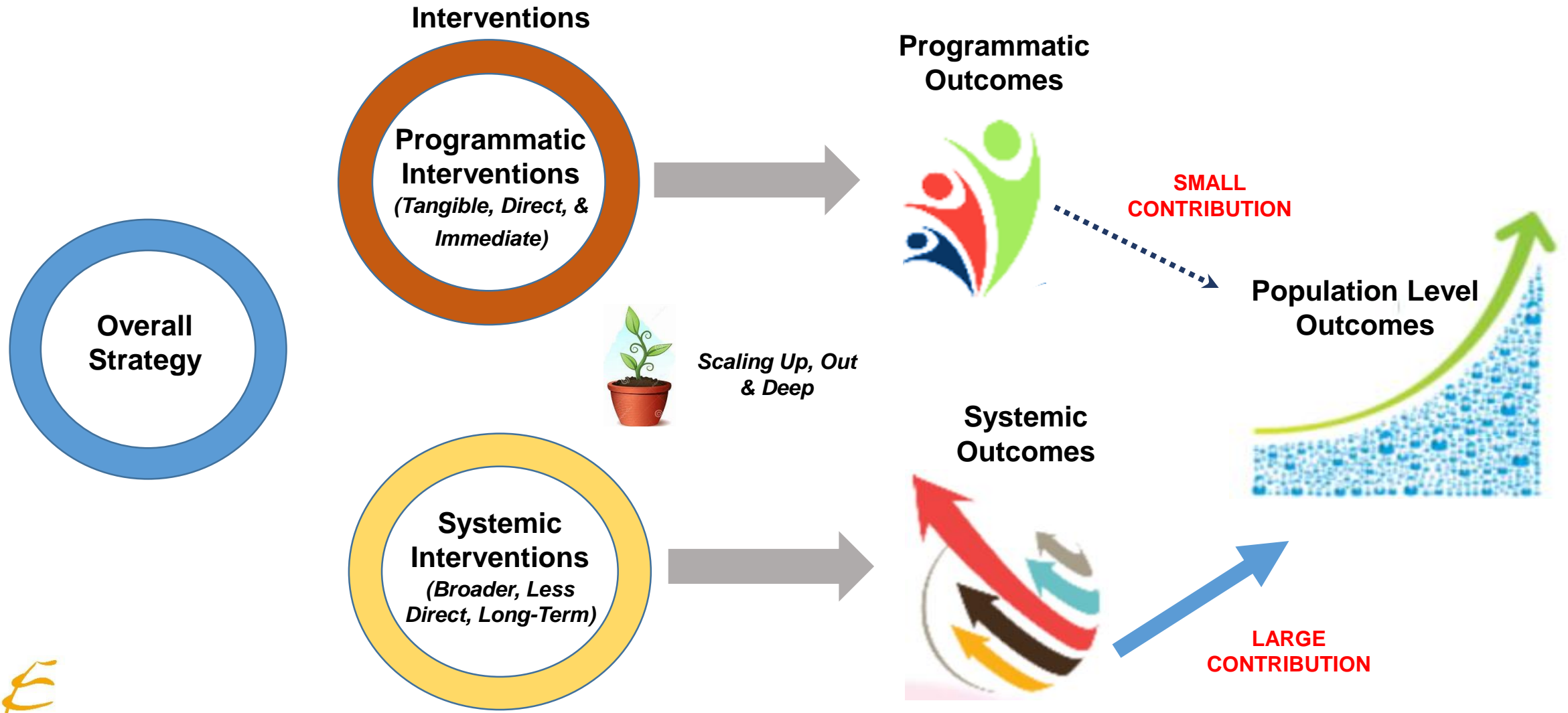
Source: *Mark Cabaj, From Here To There*

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The Flow of System Change

Six Conditions of Systems Change

- Policies
- Practices
- Resource Flows

Structural Change *(explicit)*

- Relationships & Connections
- Power Dynamics

(semi-explicit)

- Mental Models

Transformative Change *(implicit)*

Source: Kramer, Kania, & Senge, June 2018, *The Water of Systems Change*, p. 4

An Exercise in Systems Change

- **What programs could be developed to change this family's individual circumstances?**

- **What "systems" factors would you change the family AND 10,000 of their peers?**

"Every problem magnifies the impact of the others, and all are so tightly interlocked that one reversal can produce a chain reaction with results far distant from the original causes.

A **rundown apartment** with mold **exacerbates** a child's asthma, which leads to a **call for an ambulance**, which generates an ambulance bill that cannot be paid, which **ruins a credit record**, which **hikes the interest rate** on an auto loan which forces the purchase of a "beater" car that is unreliable, which jeopardizes a mother's **punctuality at work,** which **limits her promotions and earning capacity**, which **worsens her anxiety and depression,** which **increases her time off work**, which confines her to **poor housing**."

ADAPTED FROM: *The Working Poor: Invisible in America* **by David Shipler**

Strategies to Get to Systems Change

- **Policy** – advocating for policy change at local or provincial levels to improve the systems

- **Enhancing Services** – Bring in previously unnoticed practice, movement or resources to enhance existing loc[al] services

- **Learning Through Prototyping** – Start small with willing partners, learn from the experience and then expand

- **Increasing Coordination** – Re-aligning existing program[s] and stakeholders to maximize system efficacy
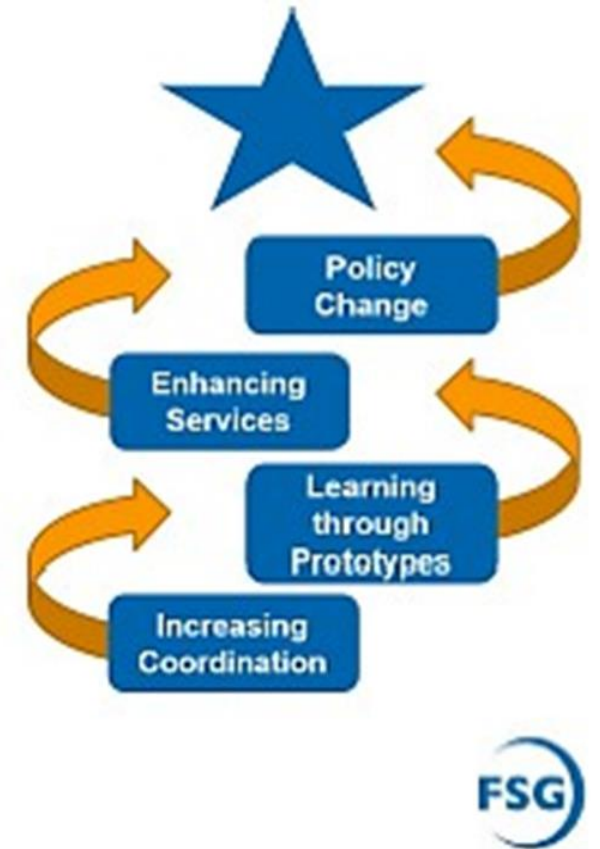
Communities: Complex Adaptive Social Systems
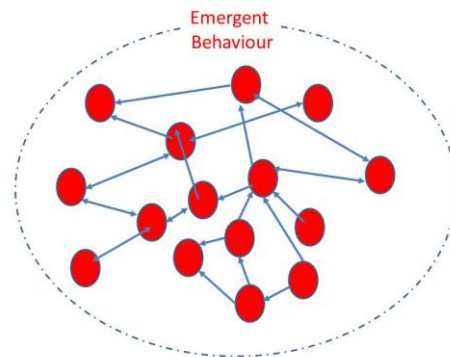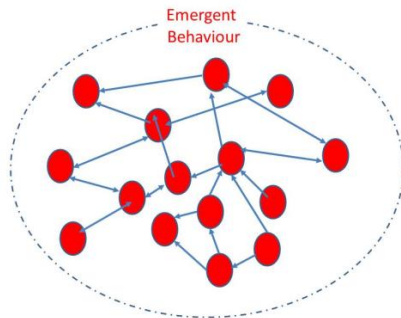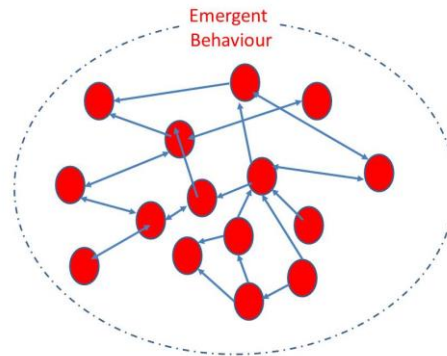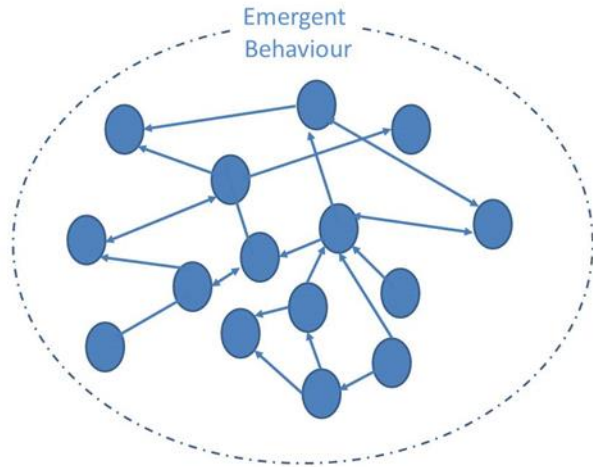
- Multiple actors
- Emergent
- Non-linear
- Unpredictable
- Dynamic/Evolving

Characteristics of Complex Adaptive Social Systems

Emergent Behaviour

1. We **disrupt** – rather than change – systems and then try to assist them to reorganize in more desirable patterns

2. Systems have **defence immune responses** – they often resist change

3. Changes in systems can trigger a **wide variety** of intended and unintended **effects**

4. Systems can experience **snap back** when they return to old ways of doing things

5. All efforts to change systems are adaptive (act, learn, adapt) and very difficult to plan much in advance

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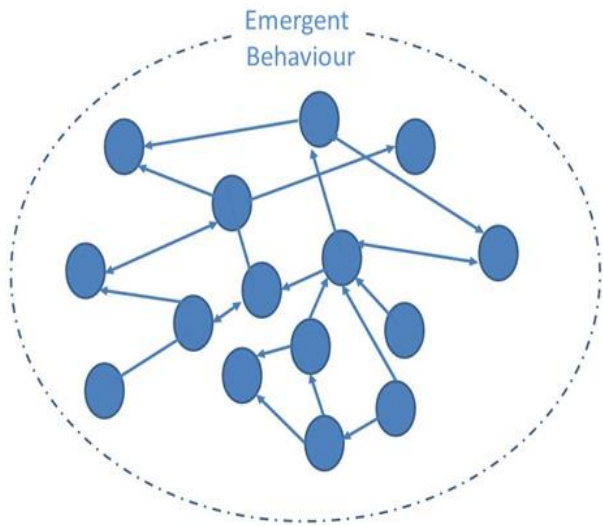
Stand Still and *See* the System

"You don't see something until you have the right metaphor to let you perceive it." .

- Thomas Kuhn

- To "see" the system you must **let go of what you know** and the solutions you are attached to and surrender to **curiosity** and **exploration**

- Complex systems have **recognizable patterns** and **dynamics** that can be influenced

- Actions to influence the system can have both **intended *AND* unintended consequences**

- The impact of an innovation can be assessed by the **"ripple effect"** how much of the system surrounding the innovation is **"disturbed"** from the **status quo**

Systems Change Efforts Can Generate Unintended Consequences

SYSTEMS THINKING: A CAUTIONARY TALE
ABOUT CATS IN BORNEO

INSPIRED BY A TRUE STORY...

What is Snap Back?

- The dominant system is very resilient. Change may be short-lived as systems "snap back" to the old way of doing things

- Snap back can occur at many levels (individual, organizational, initiative, and/or societal)

- Any effort to change systems will be adaptive, messy, ever-evolving and will often yield unpredictable results

Preventing Snap Back

- Can we decrease the resilience of the dominant system?

- Can we deepen the resilience of our innovation?
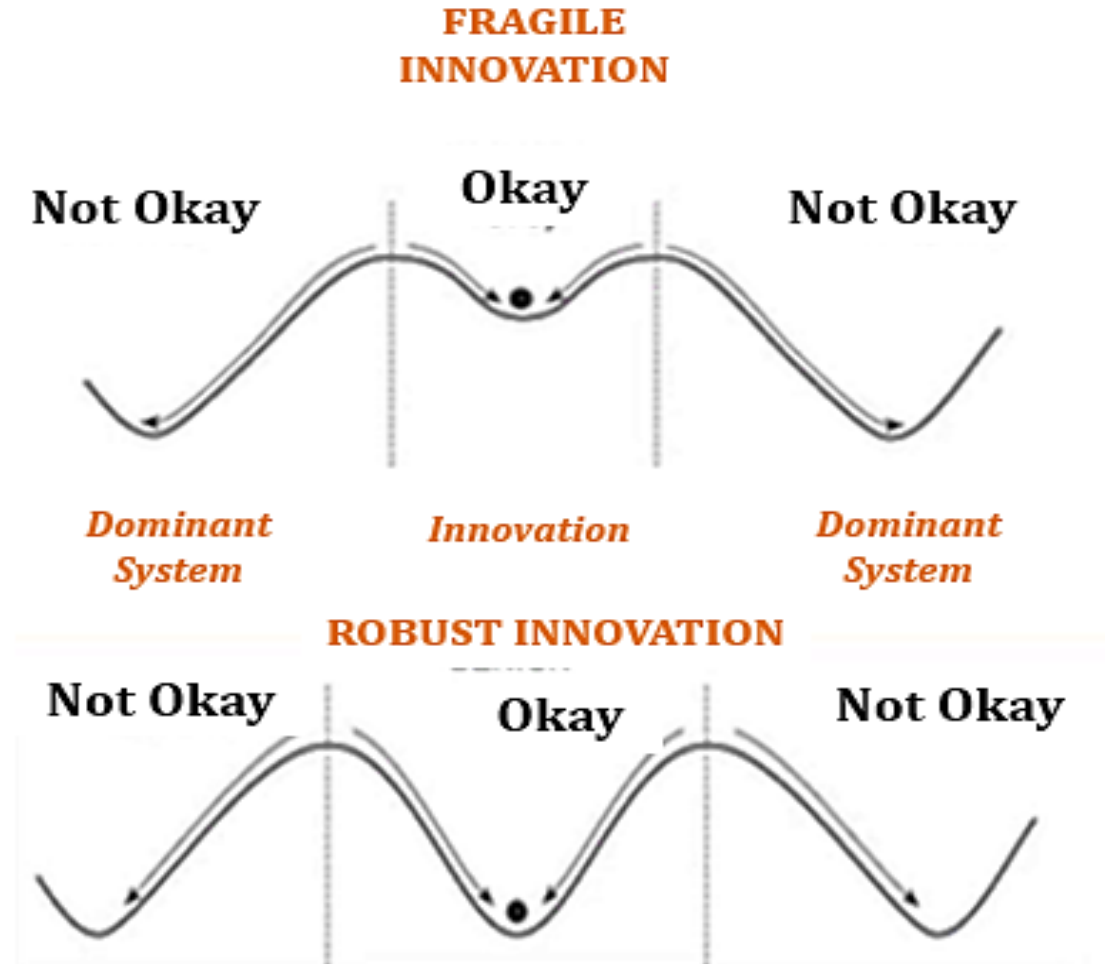
6 Actions to Prevent Snap Back

"Managers would rather live with a problem they can't solve than with a solution they can't fully understand or control"

- **Eric Bonabeau**
  CEO, Icosystems

1. Embrace unknowability

2. Relationships are key (keep the faith, enhance the attractors for your innovation, dampen attractors of dominant system)

3. Ensure community ownership of actions and measurement (trust the voice of the community)

4. Invest in ongoing engagement (don't "starve" initiatives)

5. Be strategic thinkers not just strategic planners (recognize iterative work of systems change; develop pattern recognition skills)

6. Don't confuse "quick wins" with "quick fixes" (success is NOT a destination; develop safe-fail experiments; engage both content AND context expertise)

- Comments?
- Questions?

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Exploring Opportunities for Systems Change

Looking at the issue areas for current programs & services, **identify local opportunities for systems change**

- Identify possible **opportunities for systems change**

- Identify possible **challenges in developing/implementing systems strategies**

Summarize your group's top 3 insights (1 per post-it note) to share

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Nurturing Community Innovation

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Community Innovation: A Definition

"Human ingenuity and creativity in the face of adversity is what defines us as a species. It's something we can count on, not a speciality reserved for a few."

- **Al Etmanski**
Six Patterns to Spread Your Social Innovation

- Innovation is "something **distinct** from and **more ambitious & uncertain** than continuous improvement."

- Community Innovation is a form of social innovation that is **place-based**.

- It is "**a destination**" – and resolution of a complex social and/or environmental challenge"

- It is also "**a journey**" – devising new approaches that engage multiple stakeholders to leverage their competencies and creativity to create new solutions"

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How I See + Options I Perceive = Choices

How I See

Options I Perceive

Choices I Make
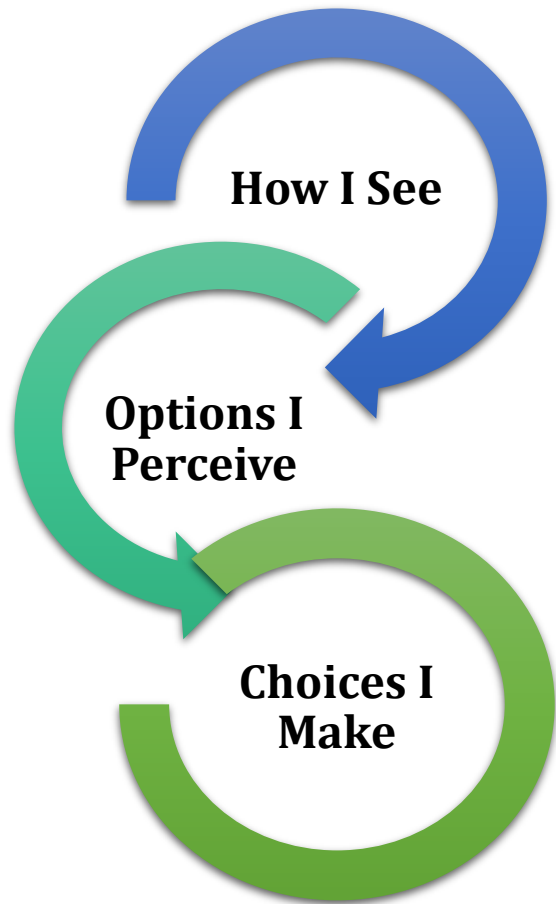
"We cannot solve our problems with the same thinking we used when we created them."

- Albert Einstein

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Encourage Disruptive Thinking

Video Renting Norms

- Select rental in store

- Term rental per video

- Per rental fee and late fees

- Fulfilment based on what is in stock.
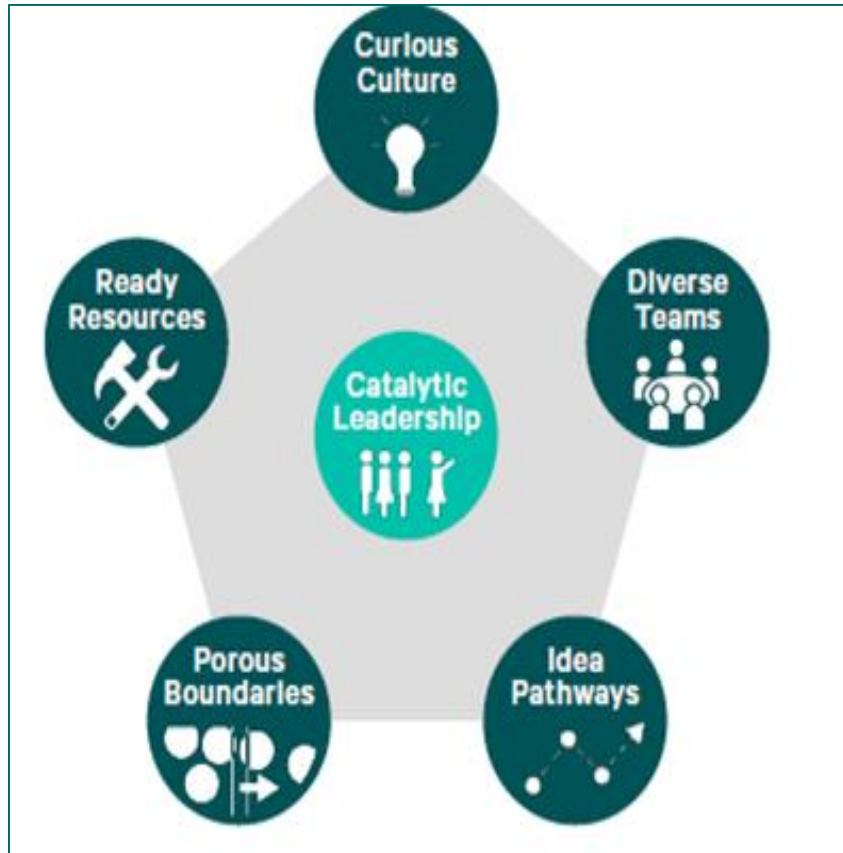
- I am a customer

- Store Hours

Disruptive Video Renting Norms

- Order online

- Unlimited access to every video

- Monthly Subscription, no late fees

- All videos offered are never out of stock.

- I am a member

- Open 24/7/365

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Building Innovation Capacity

Source: Rockefeller Foundation

- 80% of non-profit leaders aspire to innovate

- 40% say their organization is well set up to innovate

- 50% of non-profit leaders report experiencing "destabilizing regulatory shocks & policy shifts while confronting growing sector-wide competition for funding, talent and influence

- 6 elements to build innovation capacity:
  1. Catalytic Leadership
  2. Curious Culture
  3. Diverse teams
  4. Idea Pathways
  5. Porous Boundaries
  6. Ready Resources

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9 Skills of Transformational Innovators

"Researching, inventing, and innovating are intensely human processes that require agency, motivation, creativity, and grit. Encouraging such self-efficacy requires cultures that can both grow people's potentiality over time and inculcate a sense of purpose now."

\- Dr. Sarah Schulman

Develop & Deliver: Making the Case for Social R&D Infrastructure

1. Facilitating Knowledge Building & Utilization

2. Vision Building

3. Developing Social Networks

4. Building Trust, Legitimacy & Social Capital

5. Facilitating the Development of Innovations

6. Mobilizing for Change

7. Recognizing Windows of Opportunity

8. Identifying Opportunities for "Small Wins"

9. Facilitating Conflict Resolution

Source: Dr. Frances Westley, Waterloo Institute for Social Innovation and Resilience

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3 Types of Innovators

Disruptive Innovators

- "Passionate amateurs" who are motivated by necessity and inspired by love.

- They challenge the current way of doing things

- Can be perceived as "a threat" to the system

Bridging Innovators

- They are critical intermediaries between disruptive innovators to organizations and institutions

- They are astute at spotting promising ideas

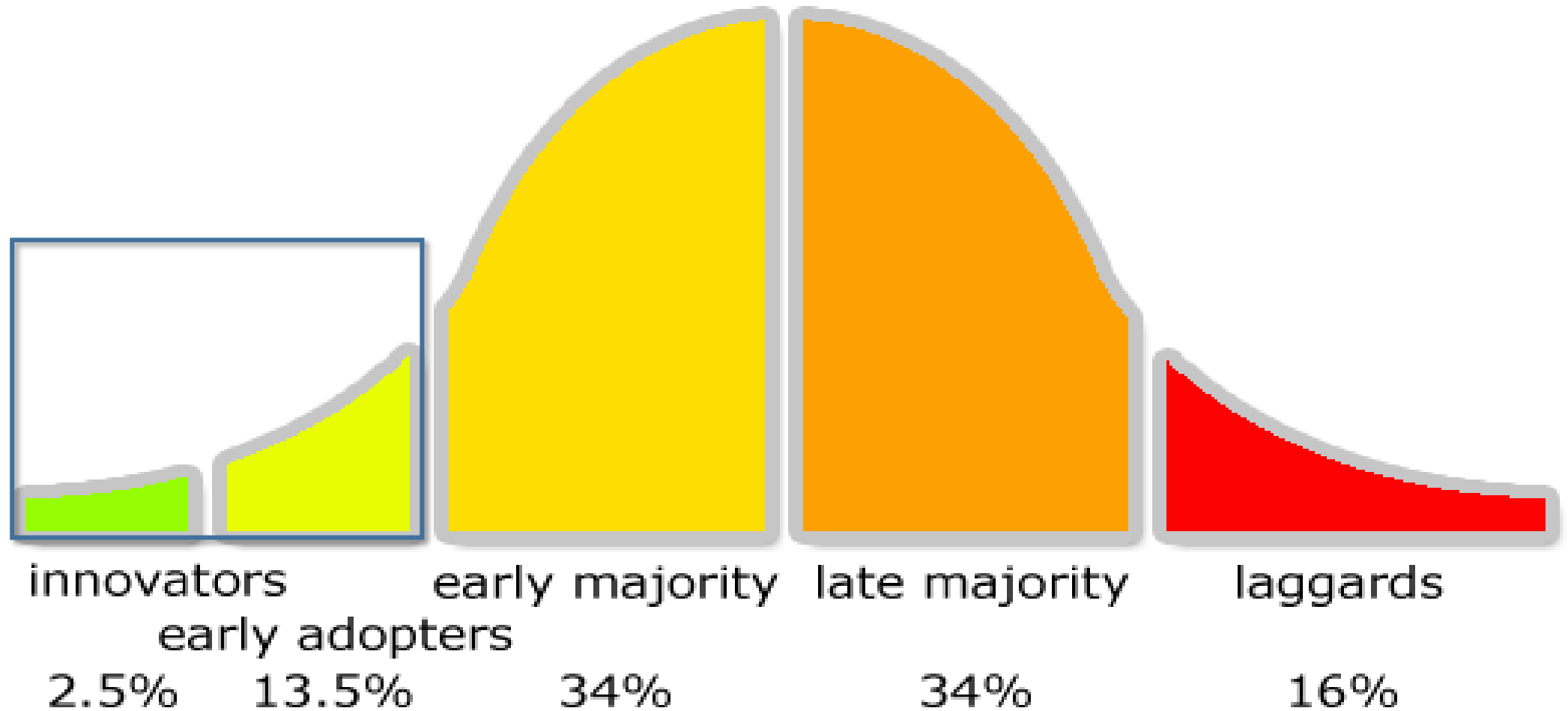- They use their relationships to lend credibility to the disruptive innovator and translate his/her ideas to the system

Source: Al Etmanski

Receptive Innovators

- Innovators within organizations

- They are able to translate promising ideas into reality within existing systems

- They use their insider knowledge of key levers to advance promising innovations within the system

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Enabling Factors for Community Innovation

	Research & Development Acquiring know-how to solve problems or exploit opportunity	Invention Creation or Discovery of a new "thing" (product, program or service)	Innovation Catalyzing new produces, processes or systems that add value to people's lives
Informed by	*Practitioners & Academics*	*Entrepreneurs & Inventors*	*Consumers & End-Users*
Examples	*New data & insights in people and/or systems*	*New social programs, practices, tools & technologies*	*New rules, networks & resource flows that facilitate use*
ENABLING FACTORS			
Individual	• Scientific skills • Deep content expertise	• Lateral thinking • Making, building & design	• Marketing, strategy, movement-building, • Operational & negotiation skills
Team	• High intellectual freedom • High tolerance for uncertainty	• High task flexibility • High tolerance for ambiguity	• High execution • High collaboration
Organizational	• Inquiry-focused • Rewards curiosity	• Product-focused • Rewards creativity	• Feedback-focused • Rewards pivots
Environmental	• Access to and/or proximity to universities, data specialists	• Access and/or proximity to industry, manufacturing	• Access and/or proximity to end-users and policy-makers
Resource Flows	• Infrastructure, tax credits, research grants	• Patents • Prizes and/or seed grants	• Venture Capital • Growth Capital
Cultural	• Learning orientation, long-term focused but with high urgency and prototyping		

Pioneers

innovators   early majority   late majority   laggards

early adopters

2.5%   13.5%   34%   34%   16%

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What Will It Take?

Ideas

Dialogue

Early Adopters

Case Studies

Investment

Networking

Tools

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Our Stance

head   hand   heart

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Our Task

1. **Co-develop** robust **practices** (e.g., principles, methods, techniques) of Collective Impact

2. **Co-build** the **capacity** we need to support these practices (e.g., skills, mental models, spirit)

3. **Co-create** the **ecology** required to support the work (e.g., networks, policies, resources, culture)

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Small Bets Before Big Bets

What do Apple CEO Steve Jobs, comedian Chris Rock, prize-winning architect Frank Gehry, the story developers at Pixar films, and the Army Chief of Strategic Plans all have in common?

Bestselling author Peter Sims found that ***all of them have achieved breakthrough results by methodically taking small, experimental steps in order to discover and develop new ideas.***

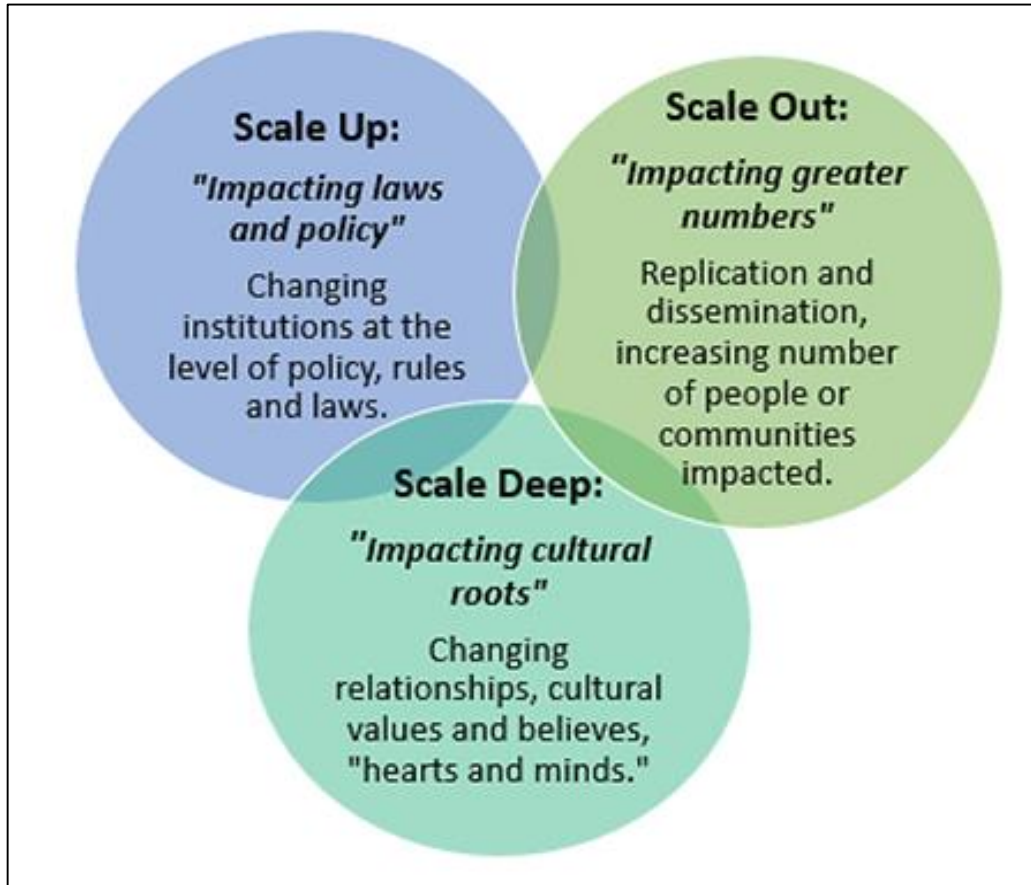*Little Bets: How Breakthrough Ideas Emerge from Small Discoveries* - [Peter Sims](#)

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The Critical Importance of Testing an Idea

1. Start by Engaging a small team of people you trust

2. Build trust – ask, "what is the change we want to see"?

3. Map the system and identify the people you want to engage

4. Invite system leaders to join your group, welcome diversity. Develop an engagement strategy.

5. Build trust – learn everything you can from everyone you can - about the change you want to see.

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Scaling Promising Innovations

Scale Up:
"Impacting laws and policy"
Changing institutions at the level of policy, rules and laws.

Scale Out:
"Impacting greater numbers"
Replication and dissemination, increasing number of people or communities impacted.

Scale Deep:
"Impacting cultural roots"
Changing relationships, cultural values and believes, "hearts and minds."

Source: D. Riddell & M. Lee Moore

- **Scaling Up** – Emphasizes "changing the rules of the game" to create a more enabling environment for the innovation to thrive.

- **Scaling Out** – Emphasizes replicating a successful initiative in different jurisdictions to affect more people or communities.

- **Scaling Deep** – Emphasizes changing beliefs – people's hearts and minds – and shifting culture to establish durable change.

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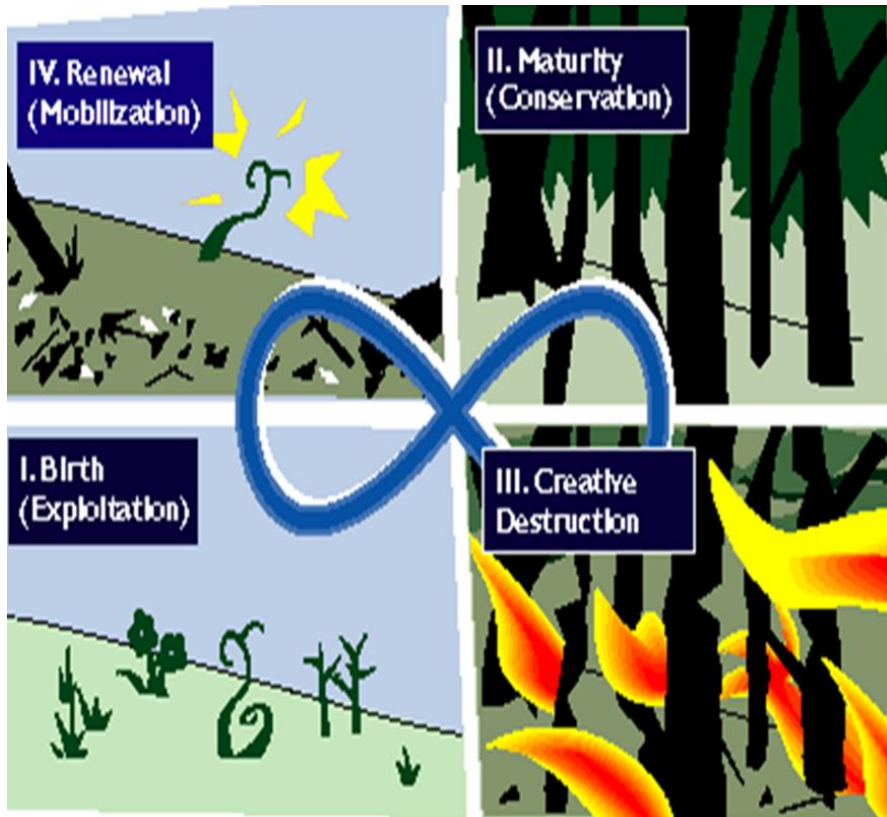
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- Comments?
- Questions?
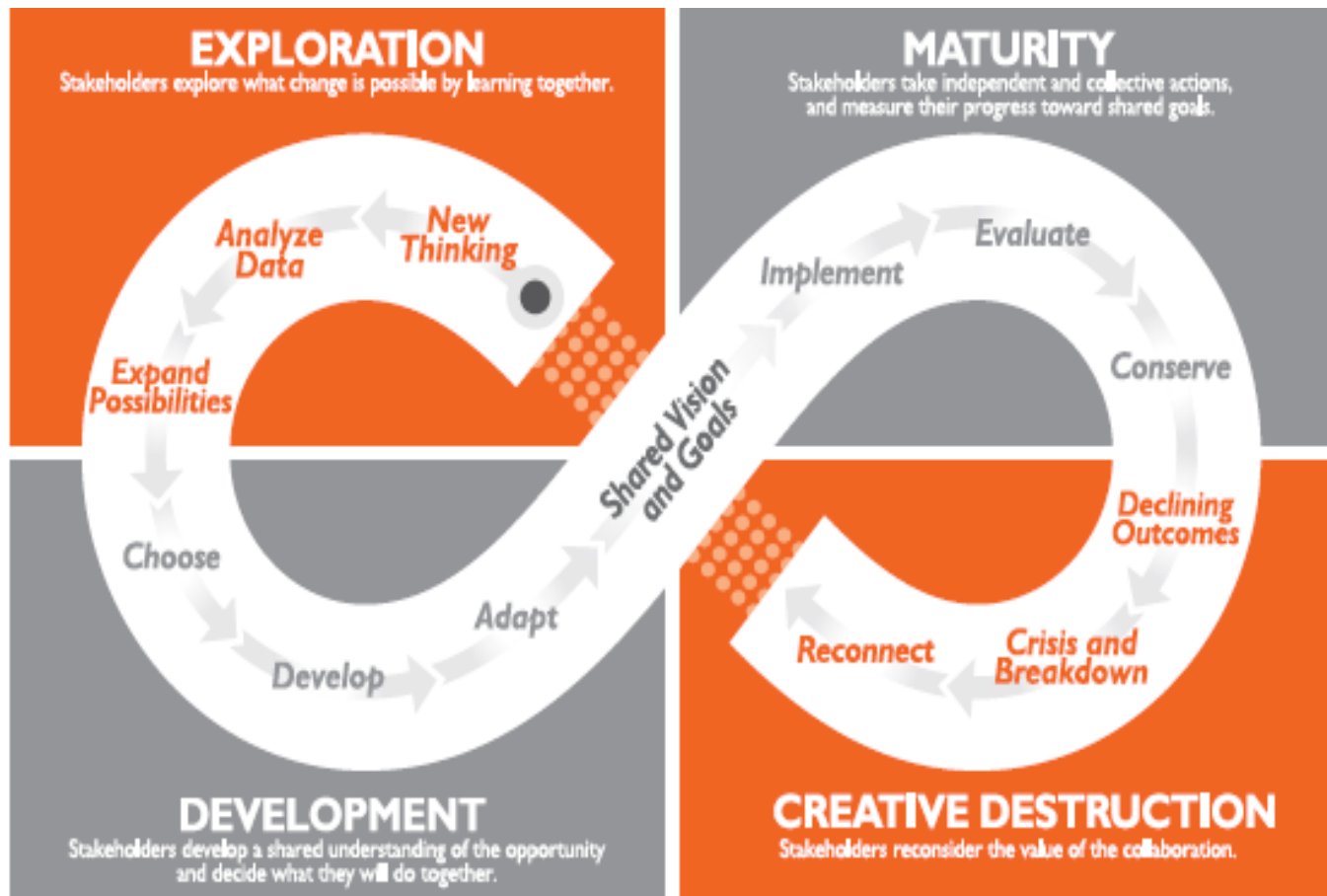
Exploring the Eco-Cycle of Community Change

Nurturing Innovation
Complex Community Work Unfolds in Phases
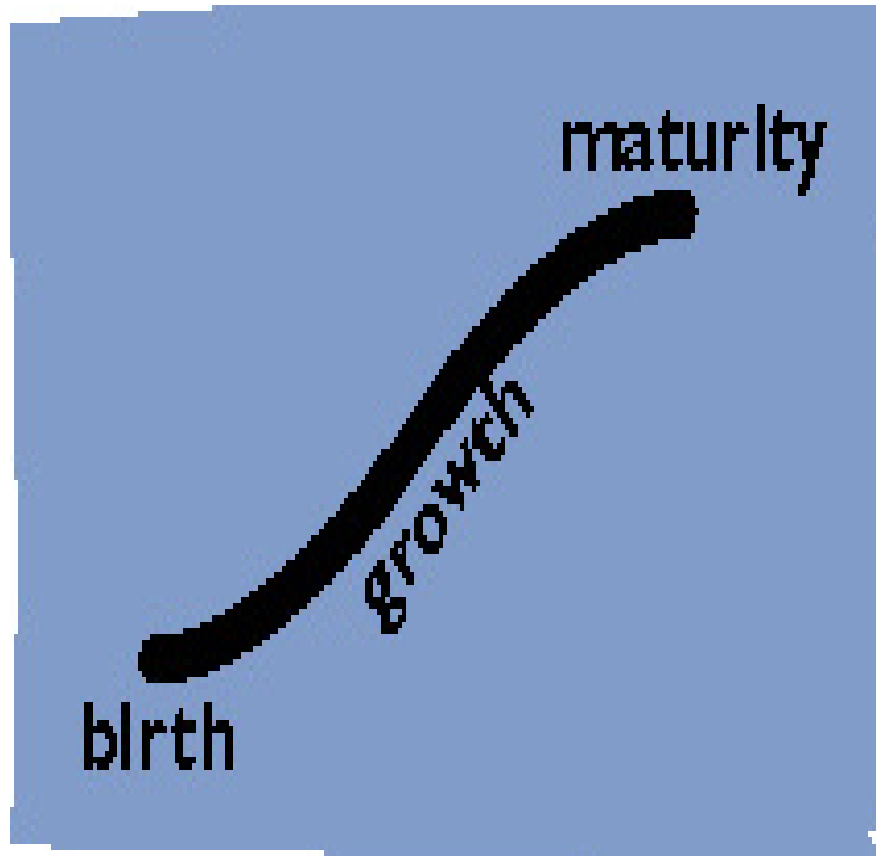

Tamarack's Lessons

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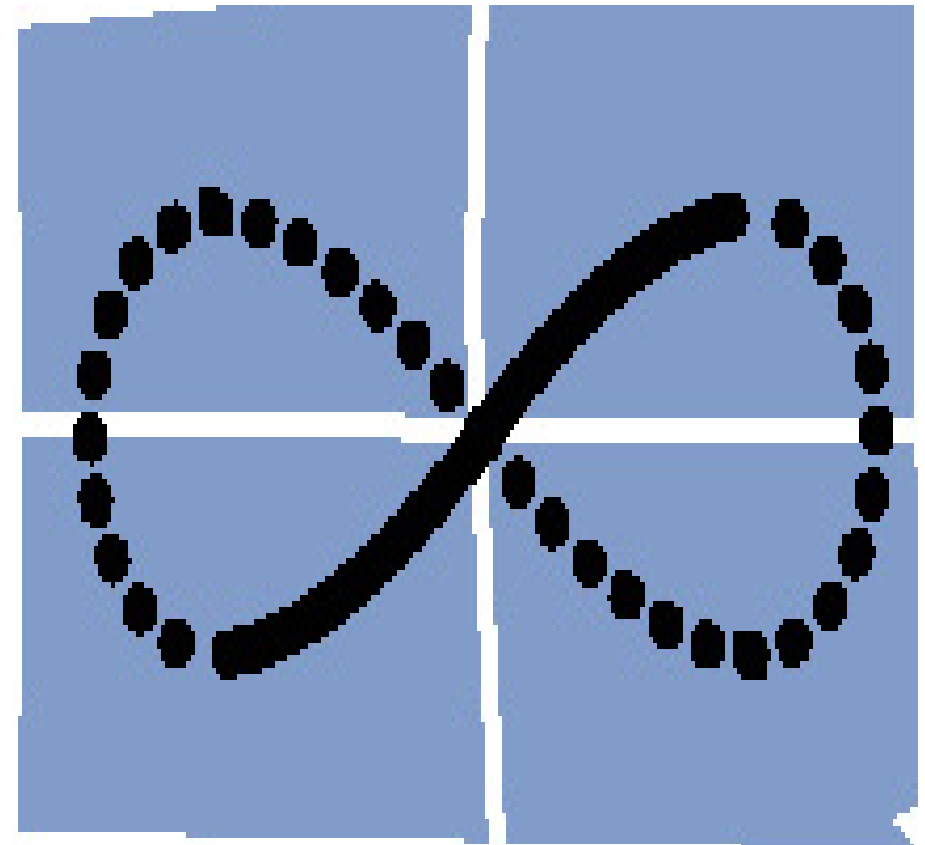- Renewal is critical

Source: www.plexusinsitute.com

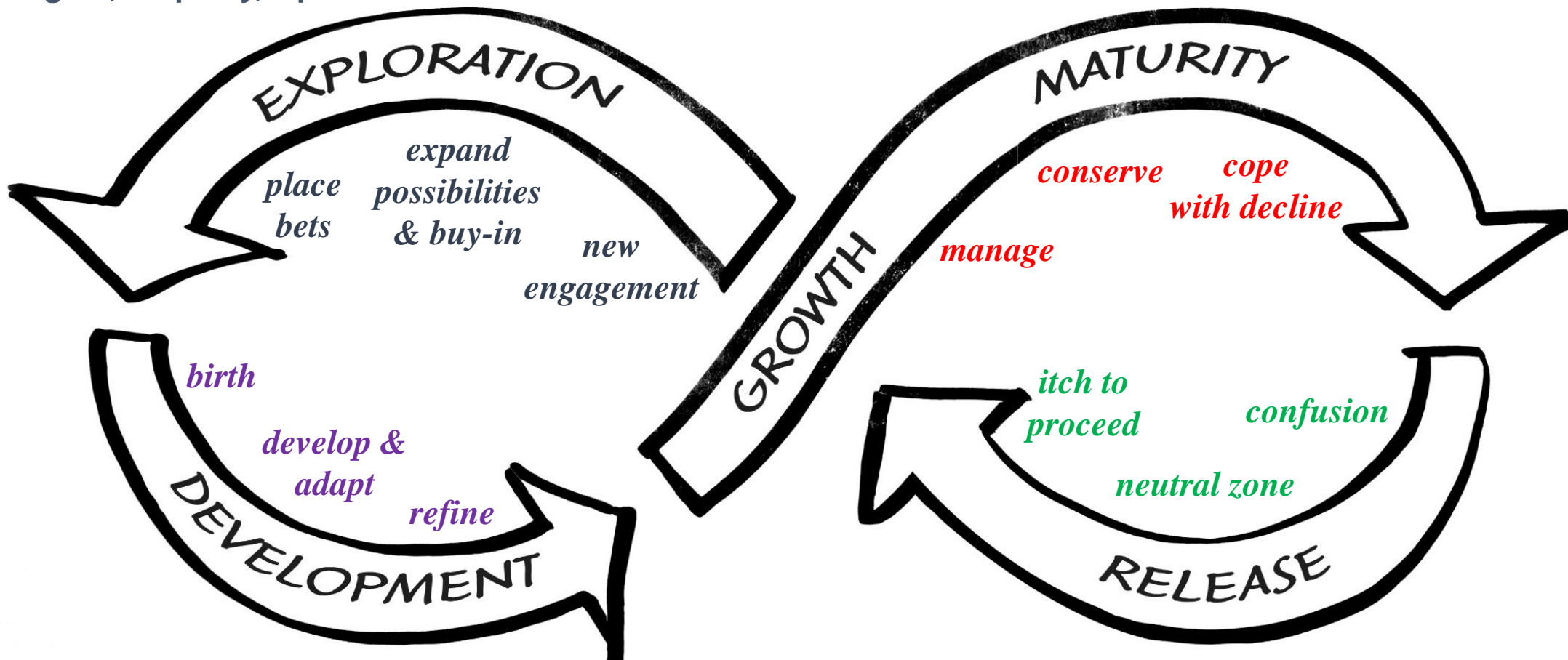# *Nurturing Innovation*
The Eco-Cycle Lens

The Performance Loop

The Renewal Loop

creative * messy * uncertain*
relationships * perspectives * conversations
research * probes & prototypes * hunches * emergence
Insights, Empathy, Options – Leader as Networker

efficiency * certainty * stability * predictability
* hierarchy * standardization * specialists
* fast returns * low risk tolerance * rigidity
High-Predictable Performance – Leader as Manager

EXPLORATION

expand possibilities & buy-in

place bets

new engagement

MATURITY

conserve

cope with decline

manage

GROWTH

birth

develop & adapt

refine

itch to proceed

confusion

neutral zone

DEVELOPMENT

RELEASE

entrepreneurial * adaptive * inefficient * flexible *
trial & error * dead ends * variation * lag times *
flexibility * tolerance for risk
Effective Practice – Leader as Entrepreneur

unraveling * chaotic * loss * anger * blame
•   conflict * angst * little structure or process *
• heavy reflection * * lean on relationships * values
New Energy & Hope – Leader as Heretic or Disrupter

Nurturing Innovation
Exercise: Mapping with the Eco-cycle

Map the Following

M = Me
O = Organization
C = Community

creative * messy * uncertain*
relationships * perspectives * conversations
research * probes & prototypes * hunches * emergence
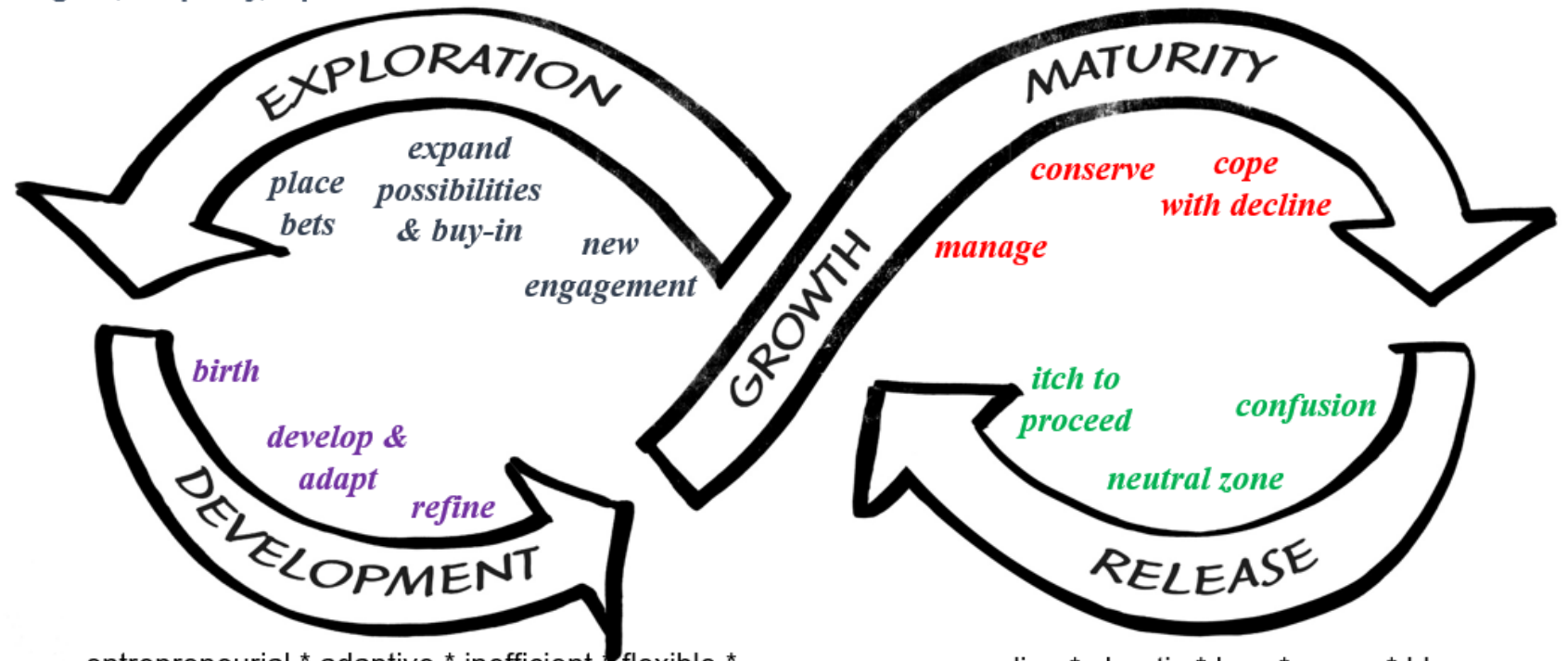**Insights, Empathy, Options – Leader as Networker**

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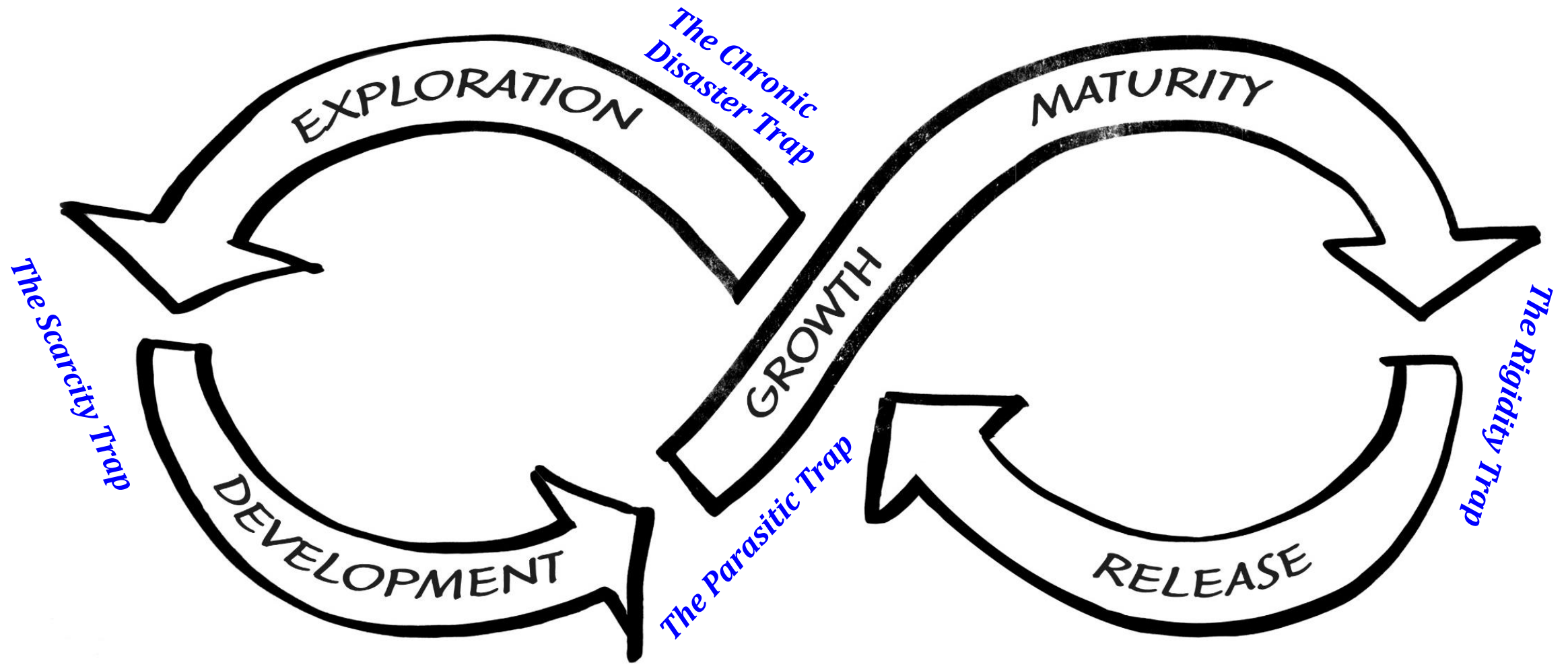
refine
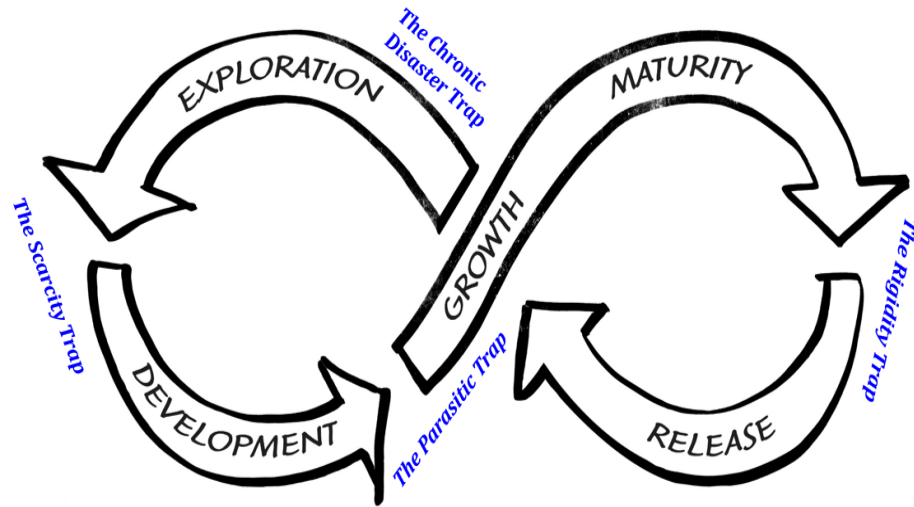
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Navigating the Traps

EXPLORATION

The Chronic Disaster Trap

MATURITY

The Scarcity Trap

GROWTH

The Rigidity Trap

DEVELOPMENT

The Parasitic Trap

RELEASE

Navigating the Traps

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

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Reflection on the Eco-Cycle & Its Traps

- What does the mapping exercise mean for you and your work right now?

- What are some strategies to lead and manage in this environment?

Top 3 Lessons Learned

Jot down the top 3 insights from this workshop that you want to carry forward in your work

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