



Institute for Conservation
LEADERSHIP

PLANNING FOR YOUR COLLABORATION

4 Key “Must Haves” From Your Collaboration’s Planning Efforts

This guide highlights key lessons that ICL staff and consultants have learned from observing and working with networks, coalitions, and alliances. As your collaboration proactively plans for evolution, apply these lessons to your work.

CLARIFIED DIRECTION



Focus your planning time on clarifying your collaboration's overarching desires and direction. Collective decision making about your future direction will be easier if everyone involved in the planning is anchored in the collaboration's history and current shared values. Often, questions like these will provoke discussions that lead to a clearer direction:

- "What is the unique benefit or value we can gain from our collaboration over the next year?"
- "What can we do together that we can't do alone?"

EXAMPLE

One collaboration thought about their direction as if it were a compass. They specifically discussed the direction they had been going, and then what shift in direction they wanted for the year ahead. "Maybe we have been headed east, and we actually need to adjust and go north based on what we are hearing from leaders in the groups." They shifted from their priority of building a brand and large web presence for collaboration itself, and instead focused the collaboration's priorities on serving two key needs of their members.

DOABLE PRIORITIES



In a collaboration's planning process it is especially helpful to consider all the options and then work hard to choose one or two priorities for activities to focus on in the next year or two.

This may include fine-tuning a current priority or identifying a new one. Making a collective statement of the priority will undoubtedly mean deemphasizing or letting go of other strategies. Consider your collaboration's overall priorities and force yourselves to ruthlessly choose based on what can support the direction you want to go in, have the most leverage for change, and engage current or new partners by understanding and meeting their needs and interests. Having a focused list of doable priorities also creates space for activities of smaller "nodes" of groups within the collaboration to pursue emerging opportunities.

EXAMPLE

A network had been doing a series of workshops together on diversity, equity, inclusion, and justice (DEIJ). Through the learning process, they had begun to identify an emerging need to connect a new constituency with sustainability efforts in their region. About 1/3 of the network's participants were interested, and they prioritized a specific set of steps to build a working relationship with a new partner over the next year. This partner could then help the network shape a new priority strategy. In identifying this priority, they also let go of a previous educational priority that included monthly "lunch and learn" sessions with the community.

IDENTIFIED CHAMPIONS



One critical way collaborations test their priorities is to ask: “Do we have at least one to three people in the collaboration who will give time and energy to making this priority happen?” It might be a fantastic idea as a priority, but without clear member leadership, it will be a struggle to marshal participation and progress. This holds true, even with paid staff coordinating the collaboration.

A clear set of “all in” and energized people who will champion the priority in the coming months will create the critical conditions for engagement and success.

EXAMPLE

In one planning process, a coalition had brainstormed eight priorities or goals for the coming year. To test this list and narrow their priorities they asked the leaders in the meeting to rank each priority on their support using a continuum:

I’ll Leave – I Like It – I Love It – I’ll Lead

After using the continuum, they had three priorities that people were willing to lead, and a couple of priorities that were mostly ranked only at “like.” They used this data to further choose and hone their priorities. As one leader said in the meeting, “If we don’t have leadership energy behind something, we don’t bother with it.”

ADDED MOMENTUM



The strength of a collaboration can often be measured by the amount of energy gathered, sustained, and created by coming together.

Momentum can be a critical ingredient in the life of a partnership or collaboration. Collaborations can gain a boost of energy with clear plans. And, if given good attention, the process of gathering, engaging, and deciding plans for a collaboration can contribute to the collective energy and momentum. With priorities driven by and exciting for collaboration members or participants, energy and engagement will grow as the work evolves and accomplishments stack up.

EXAMPLE

An alliance noticed that participation had been waning over the last six months. They set up two meetings and made personal one-on-one email and phone calls to encourage all members to attend. At the first meeting the highly interactive discussion focused on the collaboration's history, values, and recent accomplishments, as well as what had been working and what were the biggest current interests of members. In the second meeting, the group created a set of possible priorities, and chose a new priority that evolved the collaboration's focus and adapted to new needs and opportunities identified in the process.

MULTIPLE BENEFITS FROM YOUR PLANNING

While you are planning, pay attention to the following questions to improve the overall health of your collaboration. Doing so will help you emerge from the process with a clear and concrete plan, and also create a good vehicle for assessing your current communication, meeting, and engagement practices.



DECISION MAKING

Does our collaboration have a shared understanding of how we make decisions? Is the planning group clear about how we will make decisions at different steps in the planning process?



STRENGTHENING TRUST

How can we use the planning process to build the critical collaborative conditions of strong relationships, trust, and connection?



KNOWING YOUR MEMBERS

How can we better understand our members or participants – What do they want to get from their participation in the collaboration? What do they want to give or contribute to the collaboration's efforts?



INTEGRATING EQUITY AND INCLUSION

If our collaboration seeks to integrate approaches supporting diversity, equity, inclusion, or justice (DEIJ), have we given adequate time and attention to DEIJ in our planning efforts?



FINE TUNING YOUR PROCESS

How do our current “platforms” or ways of working support our new direction and priorities? And could we experiment with some new approaches as we do our planning work together?

- Do we need to adjust how we meet – Frequency? In person or virtually? Time of day? Enough engagement during our meetings?
- How do we communicate with our members or participants? Is our communication one-way or two-way?
- Do nodes or subgroups have good ways of meeting, collaborating, and connecting with the wider collaboration?

For more about planning in collaborations, check out ICL's [Working Together Toolkit](#)



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