



TOOLKIT FOR COLLABORATIVE PRACTICES

A SHARED CARE COMMITTEE GUIDE FOR COLLABORATIVE APPROACHES TO IMPROVE THE HEALTHCARE SYSTEM

FEBRUARY 2026

Prepared for:



AUTHORS



Ciaran Camman (they/them) uses equity-focused, liberatory, and creative practices to support people and organizations to use data and evaluative thinking to better understand and direct their change efforts through complexity. Since 2011, Ciaran has supported leaders and organizations across multiple sectors and service areas, combining quantitative and qualitative social science methods with creative and participatory approaches. | Website: [Camman Evaluation](#)



Garima Sood (she/her) is a service designer and design researcher who works in the public sector to support innovation and service design projects. Her work includes human centred research applied with systems thinking, trauma informed methodologies and justice perspectives. Committed to impact driven outcomes, she works with co-design, collaborative and creative methods to engage partners and communities towards co-created change-making. Her work in design research spans across sectors supporting governments at different levels to design and deliver equitable and inclusive services to people across BC. | LinkedIn: [Garima Sood](#)



Giselle Patrick (she/her, PhD) has an educational background in Applied Social Psychology with a focus on crime and social justice. Coupled with over 15 years of Program Evaluation experience in local Canadian and International spaces. Giselle has extensive skills in program logic model or theory of change development, program theory, data collection and analysis to inform program development. She has developed strategic and operational plans for organizations that are aligned with their Program Evaluation. She has worked extensively in various sectors, including but not limited to Health, Justice, and Education. Her experience in the Health sector includes working with Health Sciences at the University of Saskatchewan as well as being the internal evaluator with the Saskatchewan Centre for Patient-Oriented Research (SCPOR) while also liaising with the Evaluation network within the POR Strategy. She uses her extensive experience and skills in strategic thinking and development, critical and transformative thinking to engage in an antiracist, anti-oppressive evaluation practice that is intersectional in approach. | LinkedIn: [Giselle Patrick](#)

TABLE OF CONTENTS

BACKGROUND	5
USING THE TOOLKIT	
SECTION 1. WORKING COLLABORATIVELY	6
1. NAME THE PROBLEM AND CONNECT IT TO PURPOSE	7
TOOLS AND RESOURCES:	
- FRAMING A PROBLEM STATEMENT	8
- CONNECTING TO PURPOSE	9
- FACILITATING COLLABORATIVE DIALOGUE AND DECISION-MAKING	10
2. IDENTIFY AND ENGAGE THE RIGHT COLLABORATORS	11
TOOLS AND RESOURCES:	
- WHO NEEDS TO BE ENGAGED AND HOW MUCH?	12
- HOW DO WE ENGAGE PEOPLE WELL?	13
- USING CORE TEAMS	15
REWIND POINT	17
3. EXPLORE THE ISSUE SPACE TOGETHER	18
TOOLS AND RESOURCES:	
- QUESTIONS FOR IDENTIFYING PATTERNS	19
- PRACTICE FOR COLLABORATIVE ANALYSIS	19
- TECHNIQUES FOR VISUALIZATION AND MAPPING DATA AND CONTEXT	20
4. IDENTIFY POINTS OF INTERVENTION	21
TOOLS AND RESOURCES:	
- LOOKING FOR LEVERAGE POINTS	22
5. EXPERIMENT AND LEARN FROM SOLUTIONS	23
TOOLS AND RESOURCES:	
- IDEATING AND CHOOSING MEANINGFUL INTERVENTIONS	24
- EMERGENT LEARNING PRACTICES	25
SECTION 2: WORKING WITH NETWORKS	27
1. WHAT ARE NETWORKS AND WHY NETWORKS?	28
TOOLS AND RESOURCES:	
- BUILDING COMMUNITIES THROUGH NETWORK WEAVING	31
- HOW APPROPRIATE IS A NETWORK APPROACH?	31

...TABLE OF CONTENTS

2. FOUR ASPECTS OF NETWORKS	33
A. RELATIONSHIP ASPECT	34
TOOLS AND RESOURCES:	
- "KNOW THE NETWORK"- NETWORK MAPPING AND ANALYSIS	35
- "KNIT THE NETWORK"- NETWORK WEAVING	36
B. THE INTENTIONAL ASPECT	38
TOOLS AND RESOURCES:	
- DESIGNING THE NETWORK	39
- ADDITIONAL INTENTIONAL ASPECT RESOURCES	41
C. THE ACTION ASPECT	42
TOOLS AND RESOURCES:	
- DEVELOPING THE ACTION ASPECT	43
D. THE SUPPORT ASPECT	44
TOOLS AND RESOURCES:	
- SUPPORTING NETWORK LEADERSHIP	45
3. MONITORING AND EVALUATING NETWORKS	47
TOOLS AND RESOURCES:	
- NETWORK EVALUATION GUIDES	48
- NETWORK MONITORING TOOLS	48
REFERENCES	50

BACKGROUND

The purpose of this toolkit is to provide guidance and support to Doctors of BC (DoBC) staff, members of the Shared Care Committee (SCC), and the physicians and partners engaged in Shared Care-funded initiatives in the use of network-based approaches to improve the healthcare system in BC.

This toolkit emerged from the SCC imperative to improve how the organization enables physicians and other providers to connect, learn, and improve the health system. It was informed by a series of internal conversations with SCC members, DoBC staff, and physician partners on the SCC's current activities, goals, and context. Specific findings from that process are documented in a separate internal report.

While this toolkit has been developed with the goals, needs, and context of the Shared Care Committee in mind, the guidance and resources are widely applicable and can be revised to be specific to any group.

USING THIS TOOLKIT

This toolkit has **two sections**:

Section 1: Working Collaboratively focuses on essential practices to address complex systemic challenges through collaboration, from naming the problem to experimenting with and learning from potential solutions together.

Section 2: Working With Networks provides guidance around creating and sustaining networks as a specific type of collaborative solution to systemic challenges, from identifying when creating a network makes sense to building and sustaining a network infrastructure.

Each section includes explanatory introductions for each step and topic as well as specific tools and links to additional resources.

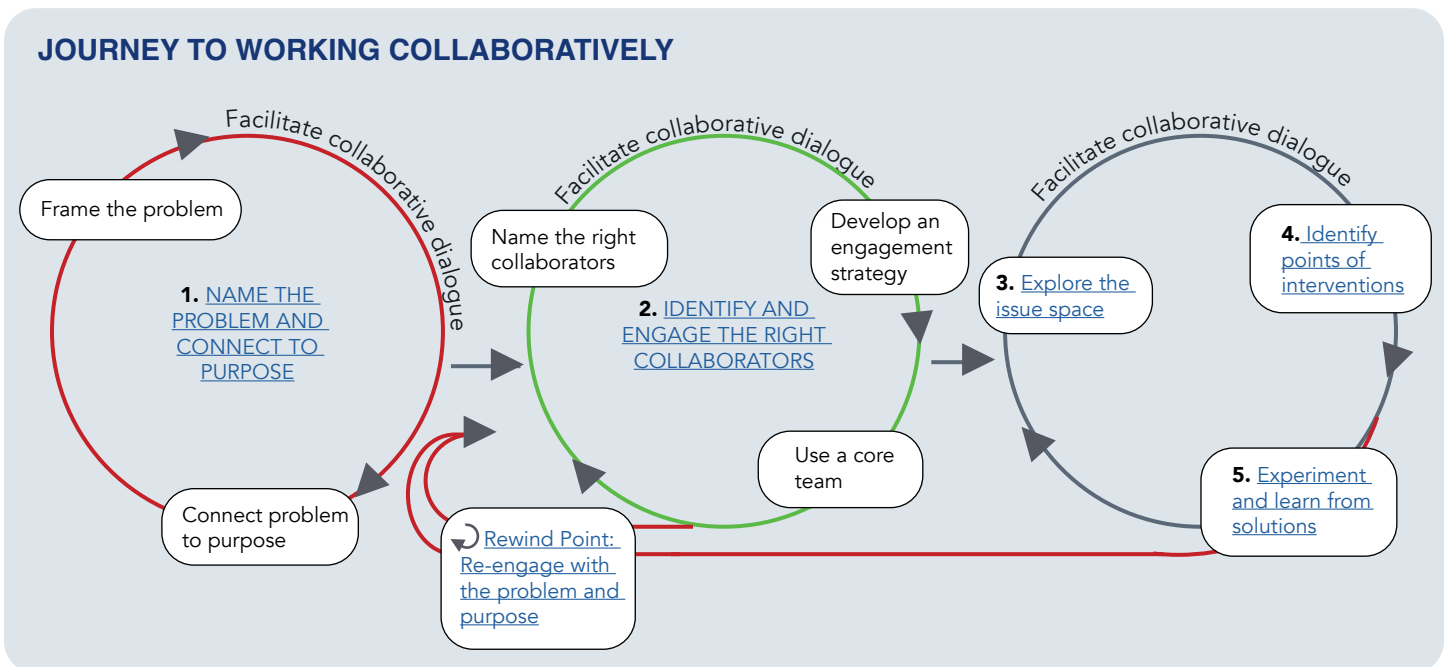
SECTION 1: FOUNDATIONS FOR WORKING COLLABORATIVELY

This section focuses on essential practices for meaningful and effective collaboration. These have been organized into the following **five steps**:

1. Name the problem and connect to purpose
2. Identify and engage the right collaborators
 - ↻ Rewind Point: Re-engage with problem and purpose
3. Explore the issue together
4. Identify points of intervention
5. Experiment with and learn from solutions

These steps are **iterative**. In other words, as you progress through this process, you will also periodically return to earlier steps to ensure that the focus of the collaboration is on track and being informed by new perspectives and learning. (Especially after identifying and engaging with collaborators, there is a reminder to “rewind” and make sure everyone agrees with how the problem has been understood and connected to purpose.)

Together, these steps describe a journey from identifying a specific system problem to experimenting with and iterating solutions together. This journey is summarized in the visual below, which is both a ‘map’ and a tool to see what has been completed and where to go next.



1. NAME THE PROBLEM AND CONNECT IT TO PURPOSE

The process begins with naming the problem being addressed and identifying how that problem relates to the overall purpose of the SCC and its specific areas of work.

This looks like:

- **Clearly describing the problem being addressed** (i.e., what is the problem we're trying to solve?)
- **Identifying how the problem is a barrier to achieving the purpose of the specific area of work** (e.g., Strategic Initiatives, Projects, Spread, Communities of Practice)
- **Identifying how the problem is a barrier to the overall purpose and mission of the group undertaking the work** (in the case of the Shared Care Committee, transforming the healthcare system)

This is a necessary starting place because one challenge of collaboration is ensuring the work remains purposeful, relevant, and coherent as people with different goals and points of view contribute.

Defining the problem as it is currently understood creates a starting point for further conversation without limiting the ability to revisit and refine this problem statement as more collaborators are engaged. Not jumping straight to a particular solution also means more alternatives can be considered, including unexpected possibilities that may emerge from dialogue among different perspectives.

It is also important to clearly link the problem to the scope of responsibility and purpose of the people who are collaborating to address it. Connecting problem to purpose through active dialogue ensures a clear, shared understanding of why the work is important and how it will help further the overall change strategy of the group.



TOOL AND RESOURCES

TO NAME THE PROBLEM AND CONNECT IT TO PURPOSE

1. Framing a problem statement

Questions to consider in clearly framing a problem:

- **Do we already have a solution in mind?** If we are saying (or hearing) “We need to do X” or “X is needed” (where “X” might be a project, a process, a role, an event, an activity, a tool, etc.), then we have identified a solution or a response, not the problem itself. We need to work backward to identify the problem. For example, “We need to connect people” is a solution. Why do people need to be connected? What might happen or be missed if that doesn’t happen? Why would that be a problem?



TIP: If you are already thinking about a network as the solution to the problem, you can use the [self-assessment tool from Section 2](#) to inform your conversation about whether a network approach makes sense and how that helps you understand the nature of the problem you want to solve. However, don’t forget that the first step is clarifying the problem, not deciding on a solution!

- **What information/data are we considering?** In other words, the specific evidence or observations that indicate a problem or need exists or a solution is needed. “Data” can be very broad in this respect. There might be formal reports and studies, first-hand observations from people experiencing the issue, second-hand accounts from those with contact with people directly impacted, etc. Having considered the data that informs the understanding of the problem, is it credible? Are there any obvious sources of data that have not been looked into yet?
- **Have we fully unpacked the problem?** Is the problem statement grounded in specific details? Could people still have very different assumptions about what the problem is without realizing it? For example, if we say the problem is, “People aren’t collaborating enough”, who is “people”? What are they not collaborating on? How much would “enough” be? Who should be collaborating with whom, about what, and why? There should be no room for misinterpretation in a shared understanding of the problem. If there are two (or more) different

interpretations that can't be resolved without further exploration, these should be clearly articulated as alternatives.

- **Do we understand why the problem is happening?** Different understandings of why a problem is happening will lead to different kinds of solutions. For example, if people aren't collaborating, is it because they don't want to, don't see the need for it, don't have the opportunities or support to, or don't know it's an option? We need to consider multiple possible explanations for the problems we're observing and return again to the first question about what data we are considering. Is there evidence to support any of these theories in particular? Is there more we need to know? Who might be able to shed more light on what's happening?



Once you start identifying why you think a problem is happening, you will very quickly start to think about possible responses and solutions. Before doing that, make sure to **write down** a clear and specific statement of the problem, including what evidence is informing that problem and why you believe it is happening. Use the following template as a reminder:

1. The specific problem we have identified:
2. The evidence/sources of data informing our understanding of the problem:
3. The potential explanation(s) we have for why this problem exists:

2. Connecting to purpose

Having identified the problem, now it is time to make sure addressing this problem fits with the SCC's goals as a whole and its goals in a particular area of work. Here are steps for this process:

- **What are we trying to achieve through addressing this problem?** If this problem were addressed successfully, what specifically should (or should not) be happening? What are our specific goals with respect to this issue? Discuss and make a list that is visible to everyone.
- **In what ways does accomplishing these goals align with our purpose? In what ways does accomplishing these goals not align with our purpose?** This is the time to bring forward specific vision and mission statements. With these statements in front of the group for reference, collectively discuss and answer these questions, one at a time.
- **Given our current understanding, should we move ahead with addressing this problem?** For some conversations, this might be a simple and quick exercise with a straightforward yes or no. Other conversations might surface deep differences in perspectives and be

harder to resolve. One option is more conditional answers, such as “yes, as long as this particular collaborator is involved”, or “not yet, pending more information from this source”. The [generative decision making tool](#) shared below may also be especially useful at this stage.



From this discussion, **record:**

4. Addressing this problem should accomplish these goals:
5. Accomplishing these goals will help us fulfill our purpose as the Shared Care Committee because:

3. Facilitating collaborative dialogue and decision-making

Being purposeful as a collective is not an easy task. This process requires thoughtful and skilled facilitation to ensure the group can move together through disagreement, consider divergent and critical perspectives, and stay grounded in shared values and goals as well as the realities of their context.

Useful resources for facilitating and supporting collaborative group processes:

- [Generative Decision-Making](#) is Samantha Slade’s practice for efficient group decision-making with generative dialogue and clear outcomes.
- [The Facilitator’s Guide to Participatory Decision-Making](#) is Sam Kaner’s comprehensive guide to supporting groups in collaborative decision-making.
- [Beyond Sticky Notes - Codesign for Real: Methods, Mindsets, and Movements](#) by K.A. McKercher is a detailed guide to trauma-informed and ethical practices for collaborative design between people with professional expertise and lived experience.
- [Liberating Structures](#) are a set of engagement tools designed to enhance coordination, trust, and participatory decision-making.
- [Art of Hosting](#) is a practice for participatory engagement and facilitation that aligns with collaborative and self-organizing processes to help groups navigate complex challenges together. Art of Hosting training workshops are offered globally by different groups, including a [Vancouver-based training](#).
- [Waterline Co-op](#) offers training and support in Deep Democracy and conflict engagement practices from a trauma-informed, relationship-centered perspective that helps build strong team dynamics through engaging with tensions and disagreements.

2. IDENTIFY AND ENGAGE THE RIGHT COLLABORATORS

Once the problem has been articulated and connected to purpose, it is time to consider who needs to be involved in addressing the problem.

This looks like:

- **Naming whose perspectives and participation will be essential** in addressing the problem as defined
- **Identifying how to engage with these collaborators effectively** to ensure that everyone who needs to be involved can be involved

For an internal process issue, this might be a small number of people with direct insight and influence over the affected area. For a system-level problem, like the maternity-care crisis, a much wider range of interest-holders should be considered. The point is to make a practice of approaching problems with a collaborative mindset and attention to who will be impacted and instrumental in addressing the issue.

Collaboration can take more time and planning than working alone, but it results in more actionable and relevant outcomes. Working collaboratively on smaller and simpler activities also builds capacity for working collaboratively on larger and more complex undertakings.



TOOL AND RESOURCES

TO IDENTIFY AND ENGAGE THE RIGHT COLLABORATORS

1. Who needs to be engaged and how much?

Consider the following when deciding who to engage in addressing an issue:

- Who will be directly or indirectly affected by this work? Who is most likely to be excluded or under-engaged due to systemic barriers?
- Who has the authority or position to accelerate or impede this work? Whose cooperation, permission, or buy-in do we need to move this work forward?
- Who has the answers or expertise we need? Who has knowledge on this issue that we don't?
- Who will be responsible for implementing the recommendations or decisions that arise from this work? Who has direct understanding of the operational context?
- Who else will have an interest in this work and will want to know about what it does and produces?



Make a list of all of the people and groups who should be considered. Be specific where possible (e.g., particular individuals and known organizations), but also group under shared labels to make the list more manageable or where specific names aren't known (e.g., "the other JCCs", "healthcare providers with an interest in cancer care").

Then assign the list into the following categories (adapted from the [Chaordic Stepping Stones](#), Corrigan, 2016):

1. **"Their direct involvement is necessary for this work to move forward."** These are the people/organizations you absolutely must collaborate with in order for the work to be meaningful and possible. ("Essential Collaborators")
2. **"Their input and support will enrich this work and their absence will diminish it, though it will be possible either way."** These are the people/organizations who may not need to be full collaborators, but should be engaged or consulted with in some capacity. ("Important to Engage")
3. **"They will want to know about what we are doing or about the results of this work, but do not need or want to be actively involved."** These are the people/organizations to keep in the loop and provide information to, but whom you do not need to actively collaborate with at this time. ("Keep Informed")

2. How do we engage people well?



For all of your identified groups, consider the following:

- Do we have existing relationships with specific people in these groups/ organizations? Do we need to strengthen or build new relationships with them?
- Do we know what matters most to them? What are their major goals, values, and priorities at this time?
- What power dynamics between us might affect how we work together? (e.g., differences in authority, access to resources, status and influence in the healthcare system)
- Do we have the time and capacity to engage them well? Do they have the time, capacity, and inclination to engage with us?

If you do not currently have the necessary relationships, information, or capacity to engage with those whose involvement is important to the work being considered, this is a sign that your first step is to strengthen your relationships. You should also revisit the purpose questions in the previous section to confirm that this work is definitely within the scope of your overarching purpose and priorities.



If you have enough relationships, information, and capacity to move forward, use the following to organize your approach for each **“Essential Collaborator”** group or person you’ve identified:

- Why is it essential to collaborate with them?
- Who are the specific contacts that we have with them?
- Who will be responsible for reaching out to them/be their point of contact with us?
- What specifically are we asking from them? (e.g., time commitment, resources)
- What specifically are we offering to them? (e.g., benefits of collaboration, the value of the work to their goals)
- What are the potential barriers to our collaboration?
- How will we address these barriers?

For the **“Important to Engage”** groups, do a similar exercise with these prompts:

- What specifically do we need to engage this group about? What information, expertise, permission, or support do we require from them?
- Who are the specific points of contact that we have with them?
- Who will be responsible for reaching out to them/be their point of contact with us?
- What specifically are we asking from them? (e.g., their input, endorsement, any time commitment)

- What specifically are we offering to them? (e.g., the value of the work to their goals)
- What are the potential barriers to engaging with them meaningfully?
- How will we address these barriers?

For the **“Keep Informed”** groups, use the these prompts:

- What specifically do they need to know about this work?
- How frequently and by what means is it best to communicate with them? (e.g., annual report, monthly newsletter, personal phone call as needed)
- Who will be responsible for reaching out to them/be their point of contact?
- What are the potential barriers to sharing information with them meaningfully?
- How will we address these barriers?

Rather than reserving this process only for large and complex projects where it seems the most necessary, use the smaller and simpler projects as an opportunity to practice and get familiar with the process under easier circumstances.



A Note on IAP2 Spectrum of Public Participation

The [IAP2 Spectrum of Public Participation](#) was designed to support groups and communities in selecting the level of participation they need from the public. The Spectrum, moving from left to right represents an increase in the impact the public participation has on a decision, with the lowest impact being at the inform level with the impact increasing through consult, involve, collaborate and at its highest at the empower level. Accompanying the impact level is the promise that each of these levels of public participation indicate to the public. That is, at the consult level, the promise to the public is to keep the public informed, while at the empower level, the promise is to implement what the public decides. This is very important in determining the level of participation that the public is being invited to have in any work. While this is an internationally recognized and used tool, its purpose is to determine the level of public participation as well as the promise to the public with that level of participation. However, it is not inherently a tool that guides how to engage people or determine who to engage.

IAP2 Spectrum of Public Participation



IAP2's Spectrum of Public Participation was designed to assist with the selection of the level of participation that defines the public's role in any public participation process. The Spectrum is used internationally, and it is found in public participation plans around the world.

		INCREASING IMPACT ON THE DECISION				
		INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
PUBLIC PARTICIPATION GOAL		To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
	PROMISE TO THE PUBLIC	We will keep you informed.	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.

© Federation of International Association for Public Participation 2014. All rights reserved. The work was created with contributions from Leevi Mäkeläinen, Marthe Rivelle and Doug Gens.

3. Using core teams

When an issue is complex and requires large-scale collaboration, it is common for the work to fall to just one or two people or organizations to actually carry out. This happens because of the practical difficulties of working in large groups and the diffusion of responsibility when many people are involved. The risk is for the collaborative intention behind the work to be eroded.

One way to address this is establishing a smaller group of people (the “core team”) who can carry the work forward while still working collaboratively with the larger group. A functional core team involves about 4-6 people; enough for a diversity of perspectives and experiences, but not so many that everyone’s voices can’t be heard in planning calls.

A core team is not the same as a steering committee or traditional working group. It is meant to support a particular project or undertaking in a self-organizing, collaborative way, not create a new layer of hierarchical management. The core team does not delegate to the larger group nor does the larger group delegate to the core team. The core team works as a microcosm of the larger group and helps prepare processes that the larger group can engage in as a whole.



The following introduction to core teams is shared by Amanda Fenton ([Amanda Fenton Consulting](#)). Contact for full document)

“Why create a core planning team?”

Almost all successful participatory projects start with a small group of people who care and hold the flame for the work. Often, in the rush to act and meet deadlines, this critical first step is overlooked, and a “magnetic field” isn’t created that holds the energy and centre and instead it fizzles out or falls on one or two people’s shoulders alone. If we wish to build collaboration and engagement through our process then we must practice collaboration and engagement in the design and delivery. [...]

What does a core planning team do?

Working with core teams is different from facilitating a planning committee. We are discovering the heart of a project and to develop a co-created capacity to host a project together. This is not the same as acting as a facilitator for a team. Core team work comes from the inside of the group, not the outside. They steward the change. They create the shift. They also embody the change. They become the designers, champions and leaders of the change, reflected in the way they approach the shift. They don't simply hire a facilitator and give orders. They host. They have a stake in the outcomes, and they believe in change. [...]

Risks when working with core teams

- Being elitist. Not everyone gets to be on a core team. Core teams sustain themselves and become trustworthy by reaching out beyond themselves and their obvious relationships to inform their work. Innovation nearly always comes from the margins, not the mainstream.
- Action in isolation. Groups within the core team just head into the blue yonder and go and do lots of work without sharing the learning back in. It is not our difference that is dangerous in this work, it is our disconnection.
- Getting ahead of the game. Core teams go through a very steep learning curve as individuals and as leaders in their community. It is easy for them to get ahead of the game and lose touch with the very people they set out to serve in the first place. Regular contact and engagement with all those impacted/involved/interested is essential."

REWIND POINT: RE-ENGAGE WITH PROBLEM AND PURPOSE

Once you have engaged your essential collaborators, before moving to the next part of the toolkit, it is important to return to the beginning and revisit **“Name the problem and connect to purpose”** with this group.

This expanded group of people may have different insights and perspectives on how the problem has been framed and the overall purpose of this work. These are people who are directly affected by the problem, who have authority to accelerate or impede your work, and have relevant expertise and experience with the issue being addressed. Making space for their perspectives is essential to hosting an effective collaboration.

Revisiting the problem together allows for:

- Relationship-building among the people involved
- More specific reframing of the problem
- Consensus across the team on what that problem is

“Identify and engage the right collaborators” together because this expanded group may be able to identify further missing perspectives and have connections of their own that can inform planning about who to collaborate with, who to consult with, and who to keep informed.

While there should be openness to and consideration of new perspectives, these additional conversations can also be informed by and build on what was established in the first iteration. Documenting your decision-making and reasoning in early stages becomes useful orientation material as new people get involved. Depending on the scale and complexity of the work, it may take a few iterations of these first two activities to reach a stable group of people who have the necessary perspectives, connections, capacity, and shared interests to carry the work forward into the next step.

3. EXPLORE THE ISSUE TOGETHER

Once the right people have been convened around a clear and shared understanding of the problem to be addressed, the next step is to work together to address the problem. The process of collaborative problem-solving isn't entirely different from solving problems alone. However, it's important to make sure the "collaborative" aspect is always upheld, especially when there is pressure to move quickly and use time and resources sparingly.

First, develop a collective understanding of the issue and its context. In other words, what is already known about the area in which the problem has been identified? This has similarities to the "Framing the problem" process described in [Step 1](#), but much more in-depth. The goal is to develop a comprehensive understanding of what the problem looks like and its larger system context.



TOOL AND RESOURCES

TO EXPLORE THE ISSUE TOGETHER

1. Questions for identifying patterns

These are questions to help generate and harvest collective knowledge about the problem to make visible what is invisible and support further pattern identification around what is happening. They are a good starting point for any exploration discussion.



1. **What specific examples do we have of this problem happening?** What happened in these stories? What can we learn from them?
2. **What examples do we have of times when this problem didn't happen?** What is different about these stories from the other ones we shared? What can we learn from these exceptions?
3. **What specific things have we (or others) already tried to address this problem?** What worked? What didn't work? Why?

Note that answering these questions requires having people with first-hand experience of the issue involved in the conversation.

Once you have data about specific instances to work with, patterns to look for are:

- Generalizations (what usually happens?)
- Exceptions (what usually doesn't happen but sometimes does?)
- Contradictions (what is happening that seems opposite or contradictory?)
- Surprises (what happened that was unexpected?)
- Puzzles (what happened that is unexplained?)

(adapted from [Bob Williams' framework for qualitative analysis](#))

2. Practices for collaborative analysis

Another source of specific guidance on collaborative analysis is data parties. While this practice was developed for evaluation, it is equally applicable to any instance where people are looking and interpreting data together.

- This brief introduction to [data parties](#) provides examples of the types of methods and questions that are helpful.
- [Dabbling in the Data: A Hands-On Guide to Participatory Data Analysis](#) offers a series of specific exercises for making sense of different kinds of data together.

3. Techniques for visualizing and mapping data and context

There are many different practices and techniques for visualizing complex data and systems which may be helpful in understanding certain problems. Potentially useful collaborative mapping techniques include:

- **Networking mapping** is helpful for understanding how a particular network is structured by visualizing all of its members and their links to each other. (See the tools shared under [“Network mapping and analysis”](#) in Section 2.)
- **Stakeholder mapping** provides a comprehensive overview of the different important people and groups involved in a particular system. A stakeholder map can also be turned into a network map by adding links to show which stakeholders are connected and how, and so can be a good first step before network mapping.
- **Ecosystem mapping** focuses on visualizing a broad range of elements including people who are not active stakeholders or members of a network (e.g., opponents, bystanders) as well as broader system forces/factors (e.g., policies, geography, culture) in order to build a broad picture of an overall system context.
- **System mapping** focuses specifically on creating causal diagrams of how different system elements or factors are believed to be influencing each other. June Holley’s *Network Weaver Handbook* (2012) includes a simple “Drawing Your System” exercise (p. 335) and Chapter 16. **Developing Your Network Strategies** includes more practices and examples of using system mapping in conjunction with a network-based approach to systems change.

The most important aspect of using visualization techniques in collaborative problem solving is that **process** matters more than product. The insights come from engaging with the data to create and analyse a visual together, not just from having a visual product at the end.

4. IDENTIFY POINTS OF INTERVENTION

The next step in collaborative problem-solving is to shift from understanding the issue and its context broadly to pinpointing points of leverage and specific opportunities for intervention.

Note that this is still a step away from identifying solutions. Identifying intervention points is about analysing where the group is actually positioned to have an impact and what levers of change are available to them. If the group begins generating solutions at this point, use those ideas to backtrack to the specific points of leverage that those solutions are targeting.

For complex challenges, it is also good to identify multiple potential points of intervention. There is no need to restrict to a single area of focus, though limits on resources and capacity may require prioritization of where solutions are attempted first.

As with the other parts of the process, it is important that this is a collaborative exercise. Having people with different perspectives on the system and different points of connection and access within it will greatly enhance the process of noticing areas that are powerful targets for change.



TOOL AND RESOURCES

TO IDENTIFY POINTS OF INTERVENTION

1. Looking for leverage points

In the *Network Weaver Handbook* (2012), June Holley describes high-potential leverage points as “places where something positive is occurring that can be amplified and expanded or where increasing negative feedback (for example, protests) can change public sentiment” (p. 316).

It’s also important to consider what assets and constraints the group is working with. A group that wants to advocate for a major policy change but has no connections to policy-making spaces will need to begin with developing credibility and experience in that area. Similarly for a group that wants to engage in community organizing but has few community ties.



When looking at the patterns and maps generated in the previous step, useful questions to ask are:

- What relationships do we have across the systems?
- What relationships do we not have?
- What are the constraints we are working with? (e.g., resources, commitments and agreements, timelines)
- What resources do we have? (e.g., funding, staff, access to technology, expertise, experience, reputation)
- Where in the system are interventions most likely to have an impact?
- Where in the system have we tried to intervene in the past and what has worked and what has not in those spaces?

Additional reading on understanding and identifying leverage points in systems:

- [Leverage Points: Places to Intervene](#) in a System (Meadows, 1999; or the full book, [Thinking in Systems: A Primer](#), Meadows, 2008)
- [Everyday Patterns for Shifting Systems](#) (Burkett, Hagan & Tangaere, 2023; also available as a [blog series](#)).
- [Ideas-Arrangements-Effects](#) (Lobenstine, Bailey, Maruyama, 2020; with [introductory overview](#) in the Non-Profit Quarterly).

5. EXPERIMENT WITH AND LEARN FROM SOLUTIONS

Once potential areas for change have been identified, it is time to generate possible solutions that can address the identified leverage point.

It is also important to approach this with an experimental mindset. Anticipate that initial attempts to 'solve' a complex system challenge will yield more data about what doesn't work than what does. This is why effective design processes are **iterative** (repeated cycles of learning) and **scaffolded** (starting with relatively quick, low-risk, low-investment probes and prototypes to learn about what might and might not work before leveraging those insights into higher-risk, higher-investment strategies that will take more time to implement).

A collaborative approach to problem-solving means there is usually capacity and enthusiasm to experiment with multiple possible solutions at once, with different people taking responsibility for trying different actions. There also needs to be an intentional structure to ensure the group re-convenes to learn about what happened in each of the experiments. This learning should feed back into the group's collective understanding of the issue and its context, prompting a new round of identifying potential leverage points, followed by generating and testing new possible solutions.



TOOL AND RESOURCES

TO EXPERIMENT WITH AND LEARN FROM SOLUTIONS

1. Ideating and choosing meaningful interventions



All of the steps up to this point likely generated a number of possible ideas for solutions and interventions that needed to be set to the side. This is an opportunity to review these ideas as a place to begin, or to have a generative brainstorming session informed by the previous two steps.

One way to help narrow down the possibilities is to first have people split up into smaller groups and generate as many ideas as they can on individual sticky notes. Then create a large 'landscape' with a horizontal axis on the bottom and a vertical axis on one side. Label the horizontal axis, "How much effort would this take?" and put "High Effort" on one end and "Low Effort" on the other. Label the vertical axis, "How much impact would this have if it worked?" and put "Low Impact" at the bottom and "High Impact" at the top. Put ticks from "0" to "10" on each axis.

Ask people in their small groups to rate each of their ideas from 0 to 10 on how much effort they think this idea would take to accomplish (factoring in that they would be the people doing it), and 0 to 10 for how much impact they think it could have if it were successful, then add them to the landscape. (This can also be done digitally in a shared workspace like Zoom whiteboard, [Padlet](#), [Miro](#), or even a Google slide.)

As a group, review and discuss the ideas and the patterns they see across the landscape. See if there are any common ideas that can be clustered (or perhaps have been rated differently in terms of potential effort and impact!). Low effort/high potential impact ideas are generally what sparks the most interest, but also look for low effort/low impact ideas that might still be worth experimenting with, or high effort/high impact ideas that are worth the risk.

Use this process as a way to discuss:

- **What are the interventions we're most interested in?** Why? What makes these better than the other alternatives?
- **What would we need to do to implement this idea?** What people, resources, steps, and conditions would be required? Who is willing and able to do that work?

An exercise like this is a good way to check if people are making the same assumptions about how impactful and how effortful something is likely to be, and get on the same page through facilitated discussion. The exercise can finish by prioritizing a small number of ideas to move forward with specific people volunteering to take on particular projects.

2. Emergent learning practices



One of the most helpful and easy-to-implement practices for collaborative emergent learning is [before- and after-action reviews](#) (or “BARs and AARs”). These are a set of questions that are asked and answered before and after any project or important activity, like an event or launching a new initiative or process. These questions should be answered collaboratively by the group of people directly responsible for the activity, directly before and directly after. Notes should be taken on the answers so they can be reflected on later, but the process should be light and short—no more than 30 minutes. The purpose of BARs and AARs is to have a consistent practice of intentional action and intentional learning.

Before-Action Review Questions

- What are our intended results?
- What will success look like?
- What challenges might we encounter?
- What have we learned from similar situations?
- What will make us successful this time?
- When will we do an after-action review?

After-Action Review Questions

- What were our intended results?
- What were our actual results?
- What caused our results?
- What will we sustain or improve?
- What is our next opportunity to test what we learned?
- When will we do our next before-action review?

From: [Before and After Action Reviews - Emergent Learning](#)

In the *Network Weaver Handbook* (2012), June Holley includes a list of “Questions to Ask that Lead to Deep Reflection” (p. 143) that are intended to promote capacity-building and deepen relationships by encouraging people to reflect together on collaborative projects. For example, “Were there people or perspectives missing from this project that you would include next time?” and “What skills were most useful during the project? What skills did this project make you realize you need to acquire?”

BARs and AARs are also part of the [Emergent Learning Framework](#), a series of practices for iterative, emergent learning by groups of changemakers that aligns well with collaborative and network-based approaches.

For more on the Emergent Learning Framework:

- [Emergent Learning: A Framework for Whole-System Strategy, Learning, and Adaptation](#) (2016), the original paper by Marilyn Darling and colleagues introducing the framework and its practices.
- [Guide to the Principles of Emergent Learning](#) (2023), a recent guidebook of effective practices and principles developed by a community of emergent learning practitioners.
- [Emergent Learning](#), the website with links to other resources.

SECTION 2: WORKING WITH NETWORKS

The remainder of this toolkit provides guidance around forming and working with networks as one kind of collaborative intervention to address system challenges.

Creating and sustaining a network is a complex undertaking that requires time, commitment, and ongoing resources. Not all collaborative efforts need to lead to forming new networks, but the collaborative practices in **Section 1** lay the foundation for creating and working as a network and developing the skills, mindsets, capacity, and relationships for good network-based practice.

This section of the toolkit is not a step-by-step guide to creating networks, but rather a guide to navigating the comprehensive resources available on creating and working with networks.

It has been divided into the following topics:

1. What are networks and why networks
2. Four aspects of networks
 - a. The relationship aspect
 - b. The intentional aspect
 - c. The action aspect
 - d. The support aspect
3. Monitoring and evaluating networks

In addition to the introduction to these topics provided in this toolkit, it is worthwhile to review the [Network Weaver Handbook](#) (Holley, 2012) and [Connecting to change the world: Harnessing the power of networks for social impact](#) (Plastrik et al., 2014) for more in-depth information, practical guidance, and additional tools. Specific chapters and highlights of these and other resources are referenced throughout this section of the toolkit.

1. WHAT ARE NETWORKS AND WHY NETWORKS

What are networks?

Networks are defined by the following characteristics:

1. Made up of **nodes** (members) who are **connected** to each other
2. Across those connections, there are **exchanges** (e.g., information, resources, ideas, support)
3. Decision-making is **decentralized** and the network's activities and exchanges are **self-organized** (i.e., members themselves are choosing who to connect to, what to do, what to exchange, as opposed to being governed by a centralized authority)

As described by Krebs and Holley (2006), well-developed networks will have a **core** (a central group of highly connected and engaged members who are primarily carrying out the main activities of the network) and a **periphery** (additional connections who are less tightly connected and involved in the main network activities, but represent those who may be moving into the core as they become more connected, or serve as bridges between the core of the network and other communities) (see image 1 below).

As a structure, networks are different from hierarchical organizations. Hierarchical structures are top-down, with responsibilities formally divided among and assigned to specific roles, stratification of decision-making power at different levels of responsibility, and reporting structures that maintain clear lines of authority and accountability within this structure. People must "go up the chain" to be assigned responsibilities or to get permission to act on anything outside the defined scope of their role (see image 2).



Image 1: Visual of a network

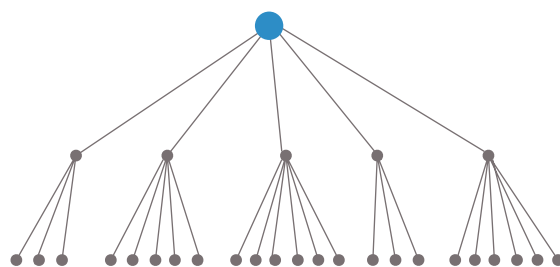


Image 2: Visual of a hierarchy

While networks have systems for communication and accountability, there is much more fluidity in roles and relationships compared to a hierarchy. Authority and responsibility are largely decentralized and distributed throughout the network, with people taking on responsibilities and changing roles to suit a particular situation and need. Authority is not concentrated in the hands of one or a few people. Even if there is a small group providing stewardship and leadership, part of that role is to maintain the conditions for the rest of the network to act with a high degree of autonomy rather than relying on 'those with authority' to assign responsibilities and direct action.

Neither a network nor a hierarchy are better organizational structures. They have different strengths and purposes. Hierarchies tend to be slower, more stable, resistant to change (for better or worse), and help enable compliance and order. Networks tend to be faster, more adaptable, and enable creativity and change, but also require a high degree of cooperation and commitment from members to take shared responsibility and stay in good relationship. Because networks are so dependent on being self-organizing, it also takes a different way of thinking to use a network to achieve a specific outcome.

Why networks?

Given the differences between networks and hierarchies, when is creating and using a network a good idea? Networks are not universally useful solutions. They require significant work to create and maintain and have particular advantages as well as disadvantages. Creating a network also requires support and buy-in from those who are expected to participate in the network and those being asked to resource and fund it.

When networks are being considered as a solution to a challenge, attention should be paid to what makes the development of a network an appropriate response to that situation. There should also be consideration of whether there is a shared understanding about what networks are and how they work among collaborators involved.

Networks are appropriate solutions when:

- ✓ Information and resources need to move quickly in all directions
- ✓ It's not essential to maintain centralized control—leadership and decision-making authority (as well as resources) can be decentralized and shared among many
- ✓ No one person or group can solve the problem on their own; it requires many people with diverse perspectives and experiences working at the same time, trying and sharing new ideas together
- ✓ There is a shared commitment to and valuing of relationships and collaboration among all partners
- ✓ There is appreciation of and high tolerance for change, conflict, ambiguity, learning through trial-and-error, and being flexible and responsive to changing

circumstances (especially among those who would be funding and sustaining the network)

Networks are not appropriate solutions when:

- × The goals of a project don't require it (i.e., linear, known, predictable processes that need to be carried out consistently and with clear lines of accountability, like processing payroll or administering clinical trials)
- × The people and organizations who would be involved are not prepared to collaborate with each other (i.e., they don't want to or can't share decision-making and resources, or make collaboration a sustained priority among other competing priorities)
- × Those funding and stewarding the project aren't prepared to support what networks require (i.e., sharing control of resources and decision-making, accepting a degree of uncertainty about process and outcomes, long-term commitment to developing and sustaining relationships)

(Adapted from Holley, 2012; Plastrik & Taylor, 2006; Plastrik et al., 2014)

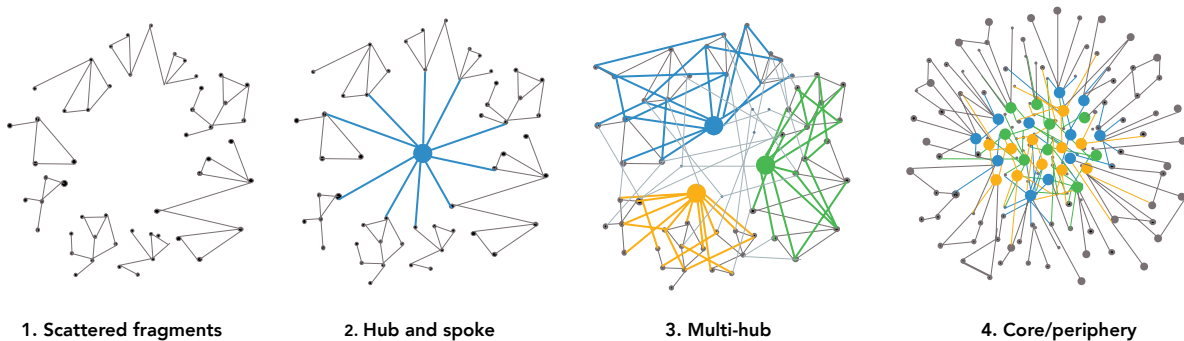


TOOL AND RESOURCES

WHAT ARE NETWORKS AND WHY NETWORKS

“Building Communities Through Network Weaving”

The article, “[Building Communities Through Network Weaving](#)”, by Valdis Krebs and June Holley (2006) provides a concise primer on core network concepts and principles, including a 4-phase trajectory of how networks can form from scattered, isolated fragments into a resilient, well-connected network. Krebs and Holley offer important insights and principles about how to effectively support network formation, such as the importance of not getting stuck in the “hub and spoke” stage where everything moves through a central point of contact instead of that central ‘hub’ using their position to develop more relationships among the nodes.



This article is an excellent orientation to a general understanding about networks and should be part of the initial reading for any discussion about creating networks. It introduces network-specific concepts and terms (e.g., bridges, hubs, weak and strong ties, periphery vs. core) that can inform a common language and understanding about networks, including their advantages and pitfalls, in conversations among collaborators.

How appropriate is a network approach?

The following self-assessment tool is adapted for the Shared Care Committee from June Holley’s *Network Weaver Handbook* (2012, p. 63). It is not a diagnostic tool; there is no threshold or result that indicates precisely when a network is needed or not needed. Rather, it is a reflective tool that should lead to deeper conversation about whether a network makes sense as well as potential challenges to consider.



Instructions:

For each of the following characteristics, circle one number from 1 to 5 that best describes where your efforts fit. The more 1's, the more a conventional hierarchical approach makes sense. The more 5's, the more a network approach is appropriate.

The issue affects one or a small number of people/organization	1 2 3 4 5	The issue affects many people and organizations across many different contexts
We already have enough perspectives and knowledge to understand and address the problem	1 2 3 4 5	We need new and different perspectives and sources of knowledge to understand and address the problem
Nothing much needs to change	1 2 3 4 5	We need whole new systems and ways of working
We need a clear plan with pre-defined steps and outcomes	1 2 3 4 5	We need flexibility to figure out a plan and evolve our understanding of steps and outcomes as we go
We know exactly what actions to take	1 2 3 4 5	We don't know what actions will be necessary or even possible
We want to develop specific models and practices that can be replicated exactly	1 2 3 4 5	We want to generate and share insights and learnings that can be adapted as needed
We need a clear chain-of-command with one person or group making final decisions	1 2 3 4 5	We need lots of self-organizing activity among many people at once
The role of leadership will be to delegate tasks and make sure things happen as planned	1 2 3 4 5	The role of leadership will be to connect people and catalyze activity so new things can emerge
Resources will be situated with one organization or group	1 2 3 4 5	Resources will be shared among many groups and organizations
We already know what resources are available and where	1 2 3 4 5	We need to identify new resources and sources of support

Adapted from Holley, 2012, Network Weaver Handbook

After completing this assessment tool, reflect on and respond to the following questions as well:

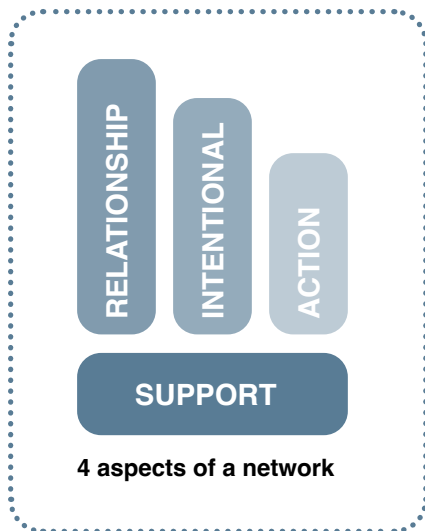
1. Based on these reflections, what challenges are we likely to face in taking a network-based approach to addressing this problem? How would we mitigate or address these challenges in our approach?
2. Based on these reflections, in what ways are we already well-positioned to take a network-based approach to addressing this problem? How would we build on these strengths in our approach?
3. Overall, do we believe a network-based approach is the most appropriate solution to explore at this time? Why?

2. FOUR ASPECTS OF NETWORKS

To further understand what a network is and how they are formed, especially in the context of creating and using networks to address systems issues, it can be helpful to distinguish between the different aspects that make up these networks.

In the *Network Weaver Handbook* (2012), June Holley describes four aspects of a network:

- **Relationship:** The foundation of relationships and connections on which any network is based.
- **Intentional:** The purpose that gives a particular network its form and direction (i.e., the issue or vision that a network forms around).
- **Action:** How a network is set up to enable its self-organizing activity and what kinds of action it is meant to enable.
- **Support:** The infrastructure that enables the network to exist and function (e.g., communication, decision-making, resourcing, etc.).



Note that these aspects are not different types of networks. One network will have all of four parts (to some degree, depending on its purpose) and these parts will be interlocking and support each other. Distinguishing the aspects is helpful to ensure each one is being thoughtfully developed as part of the overall structure of the network.

The next four topics focus on each network aspect and specific resources for each.

A. The Relationship Aspect

Relationships are the foundation of networks. In the language of June Holley's *Network Weaver Handbook* (2012), the **relationship aspect** of a network refers both to the vast set of connections and relationships among all people generally (within which more intentional, organized networks can form around a shared issue, need, or goal) as well as the specific relationship infrastructure of those intentional networks.

The effective formation and health of the underlying relationships and connections is fundamental to any other network activity or goal. Being members of the same group (e.g., a community of practice) is also not the equivalent of being in a strong relationship network. If members do not know, trust, or communicate with each other, the group will not function as a network. Members of a network do not need to be in relationship with every other member of that network, but they do need to be able to easily find and connect with each other as needed.

In their article, "[Building Communities Through Network Weaving](#)", Krebs and June Holley (2006), summarize the two key practices for developing connections among network members as 'Know the Network' (knowing who is and who needs to be connected) and 'Knit the Network' (facilitating the conditions for connections to form and deepen).



TOOL AND RESOURCES

THE RELATION ASPECT OF NETWORKS

“Know the Network”: Network mapping and analysis

Network mapping (also known as social network analysis or SNA) is the practice of visualizing all of the nodes (the members of a network) and connections in the scope of a given network (i.e., the relationship aspect of the network). Think of it like taking an aerial photo of the present composition of the network—who are the members and who is connected to whom and how?

Visualizing the network is important for assessing the current state of the network and identifying opportunities to improve its structure and use the network well (e.g., noticing silos and bottlenecks; noticing who is missing; identifying key connectors positioned to facilitate the flow of information and resources). Creating and analyzing a network map with members of the network is also another opportunity to deepen engagement and practice collaboration. Network mapping is also not a one-time exercise. Regular snapshots are necessary to monitor its structure and opportunities.

There are a number of resources that include step-by-step guidance on creating and analyzing network maps (with the caveat that the process needs to be adapted to a particular network and its context):



- **Chapter 4. Analyzing and Visualizing Your Network** from the *Network Weaver Handbook* (Holley, 2012); introduces simple and low-barrier methods for mapping and analyzing networks, including practice visuals, specific patterns to look for in analysis, and specific suggestions for improving the network structure.
- [Mapping System Shifting Networks](#) is a slide deck from June Holley that provides further examples of data collection questions about nodes and connections and examples of how to analyze patterns in network maps.
- [Planning a Social Network Analysis](#) is a simplified guide to a more technical approach for network mapping, with definitions of specific terms, examples of data collection methods and questions, analysis metrics, options for digital mapping platforms, and examples of real network map analyses.
- [Asking the Right Questions: Collecting Meaningful Data About Your Network](#) is an online article by David Ehrlichman with further examples of questions for gathering data on network connections.

The more technically-complicated versions of network mapping such as social network analysis will benefit from the support of someone who can manage the technical aspects of data collection and digital mapping. However, the process should still be collaborative and prioritize analysis and sensemaking by those directly involved in the network.

Any network mapping process also needs to begin with clarity about the purpose of the network in order to inform the kinds of questions that are relevant to ask and interpret the patterns that are found (e.g., what specifically are the people in the network supposed to be doing together? Who is meant to be included in the network in the first place?), as well as consideration of who should be collaborating to create and analyze the map. Return to the tools from Section 1 of this toolkit to support this process.

“Knit the Network”: Network weaving

Visualizing the network is only the first step in supporting the development of the relationship aspect of the network. The other aspect is ‘weaving’ the network, or fostering the necessary relationships and connections among members. This includes people who are already in the network as well as those who are not. It also includes relationships in the core of the network (the highly active centre) as well as the periphery of relationships around the outside of the network.

Priorities for network weaving will evolve as the structure of the network develops. In early development when there are few relationships (the “scattered fragments” phase described by Krebs & Holley, 2006), there will be a greater need to establish initial relationships with the intended members of the network and centrally coordinate network activities (i.e., the “hub-and-spoke” phase). Evolving beyond the hub-and-spoke phase requires:

- ◆◆ • Attention to enabling relationships and decentralized activities among network members, including working with members to define the collective value and purpose of the network;
- Fostering a culture of trust, openness, and collaboration among members;
- Engaging people in ways that are purposeful, interesting, and encourage dialogue and interaction with each other; and
- Setting up systems for communication, governance, and access to resources.

Network weaving is larger than a single tool or process, but there are a number of accessible guides with specific principles and tools, including:

- **Chapters 5 - 8 of the *Network Weaver Handbook*** (Holley, 2012) provide specific tools and practices in facilitating connections among network members, fostering a network culture that supports collaboration and relationship-building (with a particular emphasis on the importance of trust), and specific practices for engaging network members in energizing and interactive ways.
- **Chapter 3 of *Connecting to Change the World*** (Plastrik et al., 2014) provides further principles, practices, strategies, and core capabilities for effective network weaving.

B. The Intentional Aspect

The **intentional aspect** of a network is the 'why' and 'how' of a given set of connections and relationships. What differentiates a collection of people who happen to know each other (i.e., a social network) and the kind of networks that we create to solve systemic problems is the presence of a purpose: a shared intention beyond the connections that people have with each other. This shared purpose then informs other aspects of the network's design and structure, like who the members are, how they interact with each other, and what kind of action and support infrastructure they need to fulfill the purpose of this particular network.

Purpose must be co-created and co-defined to ensure it reflects the interests and perspectives of its members, with authentic consensus on and buy-in to its goals. As Plastrik and colleagues state, **"Don't dictate the network's purpose; co-create it"** (2014, p. 76). Designing the intentional aspect of the network is an activity for the network members themselves, using the same collaborative practices described in Section 1 of this toolkit.



TOOL AND RESOURCES

THE INTENTIONAL ASPECT OF NETWORKS

Designing the network

The following table (see page 41) provides an overview of the questions that need to be answered about an intentional network's design throughout its development (adapted from Holley, 2012, and Plastrik et al., 2014), starting with clearly and collaboratively identifying a purpose and then developing a structure to enable it to address that purpose.

These questions do not need to be answered all at the same time or before the network itself is established. Answering these questions together is part of how the network will be developed as a collaborative effort among its members. Designing a network will be an iterative and collaborative process, and answers to these questions may also evolve and change as the network and its membership does.

What needs to be decided about a network



Design Element	Questions
Purpose	<ul style="list-style-type: none"> • What problem is the network working on? Why? • Who is the network for? Why? • What type of activities will the network undertake? Why? • What do you want to accomplish as a network? • How will a network help you meet those goals more effectively?
Strategy	<ul style="list-style-type: none"> • What is the network's overall strategy for change? • Will the network develop a formal plan? • What are the network's priorities? • What points of leverage for system change will the network focus on? • Who else in the system will the network need to work with?
Action	<ul style="list-style-type: none"> • What action(s) will the network take? • How will the network's action(s) be organized? • What resources and capacity are needed to support this action? • How will learning from these actions be supported?
Membership	<ul style="list-style-type: none"> • Who will the members be? • Will the network have formal or informal membership? • How large will the network be? Why that size? • What will members' roles and responsibilities be? What will they be expected to do or commit to? • What assets, skills, resources, or connections will members be expected to have or contribute? • What will make membership in the network worthwhile? • How will trust be built among members? • What support will members receive or have access to?
Governance	<ul style="list-style-type: none"> • What principles will guide the network? • What will the network need to make decisions about? • Who in the network will make these decisions? • How will these decisions be made? • How will decisions be communicated and implemented? • How will conflict and disagreement be handled?
Coordination and Operations	<ul style="list-style-type: none"> • How will the network be coordinated? By whom? • How will those coordinating the network be supported?
Communication and Networking	<ul style="list-style-type: none"> • How will people in the network connect and work with each other? • Where, when, and how often will members meet and interact? • How will information be shared in the network?
Evaluation and Learning	<ul style="list-style-type: none"> • How will the network's implementation be monitored and assessed? • How will progress towards its goals be monitored and assessed?
Funding and Resources	<ul style="list-style-type: none"> • Where will the funding and resources come from to sustain the network? • Where will the funding and resources come from to carry out network projects? • What expenses will the network have? • How will funding and resources be held and distributed in the network?

Adapted from Holley, 2012, and Plastrik et al., 2014

Additional intentional aspect resources



- **Chapter 11. Intentional Network Basics** from the *Network Weaver Handbook* (Holley, 2012) provides an introduction to the range of forms and purposes that intentional networks may have and provides a set of tools for collaboratively defining a meaningful network purpose (in particular, “Network Focal Point”, p. 237; “Network Function Assessment”, p. 238; and “Your Network Needs to Decide”, pp. 241-242).
- **Chapter 12. Forming a New Intentional Network** from the *Network Weaver Handbook* (Holley, 2012) describes a 17-step process for forming an intentional network, from determining readiness to establishing a support structure. The exact sequence of steps may not apply to all contexts, but it highlights important considerations, including how relationships and capacity for collaboration are developed alongside the network structure itself.
- **Chapters 2, 4, and 5 of *Connecting to Change the World*** (Plastrik et al., 2014) offers an overview of what to expect from a developing network as well as network design considerations, including specific strategies for building network membership (including attending to the membership value proposition), establishing appropriate network governance structures, and navigating the transition from connectivity to alignment and production.
- **The Outline for a Network Work Plan** (Plastrik et al., 2014; pp. 217-218) provides an example structure for a network-specific work plan that addresses particular considerations for how networks operate (e.g., information about members, assessment of the network’s connectivity and health).
- **[Customizing a Theory of Change for Your Network](#)** from Circle Generation offers a template and guidance for articulating the specific narrative about how and why your network’s activities will achieve its outcomes and fulfill its intended purpose. This template is intended to be used as part of a facilitated collaborative process to articulate the current system state, how the activities of the network will help shift this state and what this will ultimately look like. (This template should be adapted based on the specific goals and intended activities of the network in question.)

C. The Action Aspect

The **action aspect** of a network refers to what a network enables its members to do together, whether in small projects or large collective undertakings of the network as a whole.

The activities of a network should be self-directed and self-organizing. This requires trust and good relationships among members, experience and capacity for undertaking self-directed and collaborative projects, and timely access to resources and support. However, not all networks will engage in the same type or degree of action. The specific activities that network members undertake together depend on what the purpose of the network is (i.e., the intentional aspect).

Should members be developing and carrying out projects around particular issues and needs? Seeking out and sharing learning with each other? Forming new relationships and expanding the network? Generating and spreading new knowledge and ideas? Whatever activities the network members are meant to be doing should inform the design of the network's action infrastructure.



TOOL AND RESOURCES

THE ACTION ASPECT OF NETWORKS

Developing the action aspect

Enabling action as a network involves members identifying and initiating projects and activities relevant to the network's purpose, carrying them out successfully together, and ensuring the benefits and learnings from this project are shared back to the network as a whole for collective learning.

In the *Network Weaver Handbook*, Holley (2012) notes that to engage in self-organized action, members need to be able to "identify what they are interested in working on [...] find others who are interested in that same opportunity area [...] learn how to coordinate projects [and] get into the habit of sharing widely about what is happening in their project so everyone in the network is aware" (p. 177).

Further, she identifies the following specific supports needed for enabling self-organizing action in networks:

- **Communication and engagement infrastructure** that allows people to find appropriate collaborators within the network as well as for reflecting on and sharing learning afterwards.
- **Flexible and timely access** to necessary resources to carry out network projects, including funding, space, technical expertise, equipment, etc. (e.g., a low-barrier innovation fund)
- **Training and capacity-building** in skills for carrying out collaborative projects (e.g., project management, communication and conflict resolution, project-specific skills).
- **A multi-layered project ecosystem** with a spectrum from very small activities (two people doing simple tasks together) to small projects (3-7 people work on a shared project over months to a year) to large projects (dozens of people working on multi-year projects) as a means of building the collaborative capacity of the network as a whole as well as individual network members.

For more guidance on developing the action aspect of networks, refer to **Chapter 9. Self-organizing** and **Chapter 14. Creating Enabling Environments for Networks** in the *Network Weaver Handbook* (Holley, 2012).

D. The Support Aspect

The final aspect of networks highlighted by Holley (2012) is the **support aspect**, or the infrastructure that enables the network to function as intended.

The needs of a particular network will depend in part on its structure, function, and stage of development. For instance, large and geographically-dispersed networks will need different kinds of communication infrastructure than a small local network of people who can easily meet face-to-face. A network focused on enabling direct action by members will have different priorities for resources than a network focused on building and sustaining relationships (e.g., rapid access to project-specific funding).

In general, most networks will need:

- **Communication infrastructure** to enable information to freely and easily move in the network and for members to find and communicate with each other.
- **Access to resources** to operate the network as a whole (e.g., staffing, technology platforms, convening and event costs) as well as any network projects and activities. This includes a system for ensuring resources are shared and easily accessible within the network.
- **Logistical and operational support** to help the network organize and function (e.g., setting up meetings, taking minutes and documenting decisions, maintaining information sharing platforms like websites and mailing lists, tracking expenses, updating member directories, etc.).
- **Governance and leadership support** to provide accountability, direction, and momentum to the network while also supporting the capacity of all network members to connect with each other and collaboratively self-organize, with the understanding that leadership in a network should be decentralized and not hierarchical.



TOOL AND RESOURCES

THE SUPPORT ASPECT OF NETWORKS

Supporting network leadership

In the *Network Weaver Handbook*, June Holley (2012) summarizes the key leadership roles in a network as:



- **Catalyst:** Convenes people, generates buy-in, and supports the creation of the network; helps network members decide their purpose and structure; provides logistical support and facilitation to the process.
- **Connector:** Analyzes the network; identifies missing connections and actively facilitates new relationships through introductions and opportunities for people to work together.
- **Project Coordinator/Coach:** Provides support and coordination to self-organized projects within the network; helps share back learning to the rest of the network; models good practice and coaches people to become their own project coordinators.
- **Guardian:** Holds a strategic view of the network as a whole, identifies what the network needs in terms of structural supports and capacity (e.g., communication systems, access to resources, training and capacity-building, practices for evaluation and learning).

How these roles are structured and who does them will depend on the specific needs and context of the network. In keeping with the collaborative principles of networks, these roles should be shared so that they do not fall on one person to manage alone. Most importantly, these **roles should be held by those within the network itself** as much as possible. While staff can be hired or assigned to support logistical tasks, over-reliance on non-member capacity to run the network will diminish opportunities for members to step into leadership roles and take ownership of the network. As Plastrik and colleagues put it:



When a network's infrastructure starts to substitute staff work for member work, the network is likely beginning a shift toward becoming an association that provides a range of services to its members [...] This sort of transition may be precisely what's needed, but it should be intentional and strategic, and network builders must understand that it won't result in sustaining a member-driven generative social-impact network. (2014, p. 132)

At the same time, the larger and more diffuse the network is, the more likely it is to need significant coordination support that cannot come from the network alone. There is no exact recipe for developing a support structure for a network. It is a balance that needs to be assessed and adjusted over time as the needs of the network evolve.

For more on network leadership, refer to **Chapter 2. Network Leadership** and **Chapter 15. Network Weaver Support Systems** in the *Network Weaver Handbook* (Holley, 2012).

There are many different elements and considerations for developing the support aspect of a network. For comprehensive guidance, refer to **Chapter 14. Creating Enabling Environments for Networks** in the *Network Weaver Handbook* (Holley, 2012) and **Chapters 2, 4, and 5 of *Connecting to Change the World*** (Plastrik et al., 2014).

3. MONITORING AND EVALUATING NETWORKS

Beyond creating and sustaining a network, monitoring and evaluation are important to ensure the network is working as it should and achieving its intended purpose.

Plastrik and colleagues (2014) recommend three focus areas for network monitoring and evaluation:

- **Connectivity:** to what extent members of a network are connected to each other, how appropriately the membership of the network reflects its goals, and how well these connections are enabling the flow of exchanges among members (e.g., of resource, information).
- **Health:** how well the network is set up for success and sustainability (e.g., clarity of purpose, effectiveness of governance and communications infrastructure, access to resources, member engagement and satisfaction).
- **Impact:** the extent to which the network as a collective is contributing to and achieving its intended goals and/or the extent to which members of the network are contributing to and achieving their intended goals as a result of their participation in the network (depending on the design of the network).

There is no one best way to approach the evaluation of a network. Different networks and evaluation needs will call for different tools, indicators, and approaches.



TOOL AND RESOURCES

MONITORING AND EVALUATING NETWORKS

Network evaluation guides

- **The Network Evaluation** section from the *Network Weaver Handbook* (Holley, 2012, pp. 336-339) provides a quick introduction of potential evaluation questions, indicators, and data sources for network evaluation.
- **The Guide to Network Evaluation** co-authored by Network Impact and the Centre for Evaluation Innovation includes a framing paper ([Part 1](#)) and a set of network evaluation case studies ([Part 2](#)). The framing paper outlines the challenges of evaluating networks and provides a framework for network evaluation including potential evaluation questions and methods across the three focus areas as well as different stages of network implementation. The case studies include examples of actual network evaluations, including the questions asked, methods and design, cost, and findings.

Network monitoring tools

Using these tools regularly will build capacity for reflection and learning in the network and help identify specific areas of strength and challenge that can be further explored through in-depth evaluation.

There are several tools available for this purpose, each of which can be used with minimal resources. All examine similar network attributes, but with slightly different approaches and degrees of granularity. Using more than one and comparing the results may yield additional insights to using one alone. Like other network tools, they should be used collaboratively to facilitate collective reflection and dialogue among network members.

- **[The Network Effectiveness Diagnostic and Development Tool](#)** by Diana Searce of the Monitor Institute rates networks across eight performance domains (value, participation, form, leadership, governance, connection, capacity, and learning/adaptation). It has a version for both bounded and unbounded networks, and includes specific suggestions for how to make improvements in each of the domains.
- **The Assessing Your Current Network** tool from the *Network Weaver Handbook* (Holley, 2012, pp. 91-98) rates networks across the four network aspects (relationship, intentional, action, and support). Following the assessment tool itself is a related table with specific suggestions for addressing any priority areas identified.

- [The Network Health Scorecard](#) created by Plastrik and colleagues and also included in *Connecting to Change the World* (2014) rates networks across four performance domains (purpose, performance, operations, and capacity). It is the briefest of three tools and is intended to be used frequently as a regular assessment tool. It does not include specific suggestions for acting on the results, but aligns with the guidance provided in *Connecting to Change the World* (2014) and includes links to use examples.

REFERENCES

Holley, J. (2012). [*Network weaver handbook*](#). Network Weaver.

Krebs, V., & Holley, J. (2006). [*Building smart communities through network weaving*](#). *Appalachian Center for Economic Networks*, 1-18.

Plastrik, P., & Taylor, M. (2006). [*Net gains: A handbook for network builders seeking social change*](#). Innovation Network for Communities.

Plastrik, P., Taylor, M., & Cleveland, J. (2014). [*Connecting to change the world: Harnessing the power of networks for social impact*](#). Island Press.