Backbone Organizations: A Field Guide

27 Ways to Drive Impact in Multi-Stakeholder Initiatives

This report was prepared by CollaborateUp

Summary

Getting people from across the public, private, and civil sectors to effectively work together comes down to one fundamental question: how do you get people to work with you who *don't* work for you? Humans excel at getting people to work with us who *do* work for us. Hierarchy, command-and-control, contractual relationships, and volumes of management theory tell us how to make these kinds of relationships work. Multi-sector collaborations face a host of different challenges because the people involved don't work for each other. They volunteer their time, talent, and treasure. Altruism may bring them together, but it rarely holds them together.

Most multi-sector collaborations excel at vision and fail in execution. They suffer when the original altruistic vision meets the hard reality of the daily grind. A gap opens up between collective strategy formulation and collective strategy execution. To address this gap, other researchers have already articulated the need for a "backbone organization" to hold the center on collective strategy. While that research focused on making the case for why multi-stakeholder collaborations need backbone organizations, our research focuses on the "how" of running a successful backbone organization. We discuss how a Partnership Engagement System (PES) made up of specific principles and practices of backbone organizations, working in concert with Executive Leadership, can maintain alignment, drive impact, and create continuous learning throughout the life of a collaboration.

The Vision/Execution Gap

Consider a tale of two partnerships. Both set out to tackle a big problem. Both unite companies big and small; national and local governments; and leaders from across civil society. Both have clearly written strategies, well-organized governance documents, and detailed metrics. One falters within a year of founding. The other goes on to lead a transformational conversation over decades. Why the difference?

The high-functioning partnership built itself around a clear and common purpose, a strong group identity, active involvement of the people and institutions they intend to help, and clarity about how to assess their results and impact. The other struggled because of its:

- <u>Lack of clarity of common purpose</u>. Everyone seeks meaning in their life and their work. We want to feel connected to each other and to something bigger than ourselves. A common purpose fulfills this need. The daily fire drills, tactical operations, and weekly grind distract and distort the big picture. And over time, the overarching vision and purpose can and will change. Partnerships need someone to maintain a constant drumbeat, holding the center for the collaboration itself. This goes beyond the fundamentals of leadership. Like the relationship between the brain and the nervous system in a body, a partnership's leaders (the brain) must craft and constantly articulate the common purpose as part of their job *and* they need an autonomic support infrastructure (the nervous system) that ensures constant and consistent clarity at all levels of the partnership.
- <u>Inability to drive long term momentum and funding</u>. If you're not growing, you're dying. The same is true for partnerships and the people, teams, and organizations that compose them. Partnerships need to constantly attract money and people to sustain action and impact. "Human sustainability"

and "financial sustainability" are inextricably linked. Partnerships that fail to provide adequate individual and collective growth and development – continuous opportunities to experiment, learn, grow, and innovate – run out of steam. Partnerships that fail to demonstrate a personal and collective return on investment – ROI on people's time and money – run out of money.

- Weak partnership identity. Humans are tribal. In modern societies we transfer our primordial family, clan, or tribe loyalty to organizations and nation-states. Partnerships ask us to create and maintain dual loyalties, keeping our original organizational loyalty *and* additional loyalty for the partnership. Not only is this complicated; it almost inevitably leads to conflict when the needs of the home-organization come up against the needs of the partnership. Great partnerships harness this energy, growing from it rather than being weakened by it.
- Failure to keep people and activities connected and aligned. In any great endeavor, a tension exists between focus and coordination. Individuals and teams maximize productivity when they focus and specialize on specific tasks while partnerships need to coordinate across multiple tasks, teams, and organizations. Fail to coordinate and teams end up isolated with lower overall productivity, unnecessary duplication of effort, wasted resources, and lower impact across the partnership. Over-coordinate and teams end up feeling burdened by unnecessary reporting and stuck in boring and unproductive meetings that benefit the coordinators without advancing the mission.
- Failure to actively or sufficiently involve the target population. Philanthropy fails when a few rich people get together to decide what the poor and vulnerable need and then go out and inflict it on an unsuspecting population. The poor and vulnerable and the people that work with them every day have deep insights into what will and won't work in their communities. Efforts to change business or other organizational behavior fail when well-meaning activists propose changes isolated from market realities. Partnerships can expend so much effort in building and maintaining themselves that they forget to listen, and actively involve the people they want to help or influence in the design, implementation, and assessment of the solutions they intend to create.
- Lack of clear measures of success. Partnerships need both self-assessment and comparative data. Most partnerships focus only on self-assessment. While good, this drives only incremental improvement – to make the better, faster, cheaper horse-and-buggy. Comparative assessment drives breakthrough improvement – comparing our efforts with other alternatives to solving the same problem – comparing the horse-and-buggy with the automobile or the jet plane.
- Data divorced from learning. Before humans had a written language we told stories. Our brains remember complex ideas and data when told in narrative. Too often, though, partnerships gather data with no clear sense of how the partners should interpret it in useful ways that drive learning and action. Effective storytelling marries data with memorable anecdotes and vivid examples that people can tell and retell to others, driving learning, adaptation, and also widening the circle of collaboration by inspiring others to join.

Closing the Gap: The Partnership Engagement System

To address these issues, the great partnerships we've studied used a set of management principles and practices for coordinating and closing the strategy/execution gap. We've labeled these principles and practices the "Partnership Engagement System" (PES) and Table 1 provides a summary of the six major gaps and the practices the PES uses to address each of them. Some used a formal backbone organization. Some did not. Some established a physical office or center to perform these functions. Many didn't consciously implement these principles and practices from the beginning; in fact, most stumbled upon them through trial-and-error. While not every organization calls it a backbone, each partnership designates a specific group of people to performing this function and creating a "partnership engagement system" (see Figure 1: The Partnership Engagement System). The people performing this function took responsibility for its success and generally *did not* perform other functions related to the mission of the partnership. This became their primary responsibility. We hope this field guide saves you some of their pain.

Table 1: Closing the Strategy/Execution Gap with Backbone Organizations

Vision/Execution Gaps	Backbone Organization Practices
1. Lack of clarity of purpose	1. Align & realign on vision/mission/purpose 2. Clear and consistent communications – easily shareable stories and examples of impact 3. Ruthless prioritization: constant, focused co-creation with equal attention on figuring out what to do and what not *to do*
2. Inability to drive long term momentum & growth	4. Fundraising & Partner-raising support 5. Expanding the community of interest 6. Strategic partnership communications 7. ROI narratives: stories that demonstrate a personal and collective return on people's time and money 8. Acknowledgment and recognition 9. Giving teams autonomy to prioritize and focus on their interests / specific tasks 10. Creating expectations and conditions for experimentation and innovation
3. Weak partnership identity	11. Deliberately launch & relaunch teams 12. Create symbols, names, traditions, and other partnership branding/identity 13. Explicit and deliberate team-building 14. Working IN and ON the partnership
4. Disconnected and misaligned people & activities	15. Deciding the degree of integration 16. Map the team's knowledge and skills 17. Helping define and maintain alignment on membership roles, responsibilities, rights, privileges, terms, and conditions 18. Effective and productive meetings 19. Support leaders in driving action and facilitating accountability 20. Maintaining institutional memory & decision-making
5. Failure to involve the target population	21. Understanding their needs and what they want to accomplish 22. Constant and focused co-creation 23. Outreach & engagement activities (surveys, focus groups, co-creation/design workshops) 24. Agile design & rollout methods & tools
6. Unclear measures of success and data divorced from learning	25. Fewest, most critical metrics: communicating what they are, how to gather & report progress against them and how to interpret & learn from metrics 26. Highly shareable stories incorporating measurement data, analysis & interpretation to create shared-value ROI narratives 27. Solution-finding and problem solving: lessons learned and replicable solutions (appreciative inquiry, pre- and post-mortems, after-action reviews)

Backbone Organization Principles, Practices, & Examples

As illustrated in Figure 1: The Partnership Engagement System, a backbone organization provides processes and infrastructure to enable a partnership to bridge from a given "current state" to a hoped-for "future state." In this section we take each of the gaps identified in Table 1 and provide the six Principles and 25 Practices that a backbone organization can use to overcome them.

Principle 1: Clarity of Purpose

Many partnerships expend great effort to identify and ground the partners in a common purpose when they first launch. Effective partnerships work hard to ensure all the partners maintain that clear connection to the overarching purpose of the partnership throughout their existence. The backbone organization provides the "glue" that keeps this connection strong, providing the autonomic "nervous system" that carries the signals generated by the leadership's brain by deploying Practices 1-3.

Figure 1: Partnership Engagement System

Practice 1: Aligning & realigning on vision/mission/purpose

While leadership and vision dominate the leader's day job, they don't dominate everyone else's day job, especially in a partnership. The partners have a lot of other things on their mind, both about the partnership as well as their actual day jobs. It's easy to forget that most people directly involved in the partnership volunteer their time; they have the partnership as an "other duty" assigned to them. Maintaining alignment in this atmosphere takes consistent effort. Moreover, as circumstances change for the partners individually (when something changes within their organization) and/or for the partnership collectively (when something changes in the field within which it operates) the partnership will need to realign on the vision, mission, and purpose. Backbone organizations can fill the communication gap between the leadership and the various partners as well as among the partners themselves.

The backbone organization acts as a compass, a source partners can use to remind themselves of the common purpose. Many people have had some experience with "alignment" functions that really serve more as "compliance/audit" functions. While useful in generating short term action, compliance and audit, doesn't really achieve the kind of long term commitment a partnership needs (See Figure 3: Driving Change). A well-run backbone organization proactively engages and reengages people in ways that excite them and encourages them to take ownership of the partnership.

In one partnership we were involved in, the facilitation team (a group of facilitation professionals hired by the partnership to act as a form of backbone organization) initially spent a lot of time on governance documentation. This had the effect of getting the partners to articulate their common interests and decision-making processes. This process was extremely tedious and the resulting documents didn't really come to life for the partners, which meant that few of the partners regularly consulted the governance documents. To augment the governance documentation, the facilitation team created a set of short videos, engaging the partners in the creation, review, and dissemination of the videos. The act of creating the videos brought the partners together and helped them articulate their common purpose in the simplest possible terms in 30 seconds or less.

Practice 2: Clearly and consistently communicating.

Leaders often tire of constant communication. They think, "I said that already, why do I need to say it again?" Because, as noted above, vision and strategy aren't everyone else's day jobs. Partners have lots of other things and priorities they have to juggle. An effective backbone organization provides a constant stream of content – easily shareable stories and examples of impact – the partners can reference and share among themselves and in their own individual networks, reinforcing priorities and messaging from leadership.

Example: Going Viral

Great partnership communications should leave the partners feeling freed, fueled, and inspired; giving them a basis for learning and action. There's a reason why publications like "TheSkimm"or "BuzzFeed" get more shares than a family holiday e-newsletter. They use humor, sharp writing, listicles, and other edgy formats to encourage people to easily and widely share their content. A backbone organization adapts these Practices for internal and external partnership communications. In addition to the short videos mentioned in the Aligning & Realigning Practice, that same partnership used a monthly newsletter with a "partner spotlight" to show how different partners were acting individually and collectively to advance the partnership's mission. These communications can include really low-tech options (like starting meetings with a quick vignette from a partner) to more high tech options (like Slack or other tech-enabled collaboration tools). Regardless of technology, they should be engaging, even edgy.

You simply cannot over-communicate, especially in a partnership. Harvard did a study that indicated if you wanted to get someone to take a specific action it required over four "touches" (letter, email, phone call, meeting) if they had prior knowledge of the action you wanted them to take (e.g., buy a product, send in a survey, etc.). If they had no prior knowledge, it took *over a dozen*. Most partnerships exist to raise awareness about a neglected or underserved issue and/or to encourage people to take an action or change a behavior. That means most partnerships live in the world of "over a dozen touches."

Example: The elevator (or taxi) pitch

Most partnerships spend 99% doing and 1% talking. The best spend 50% on each. This can seem unbalanced and many partners want to show results before they start talking about the partnership. This normally good instinct backfires in partnerships that attempt to tackle difficult challenges. The partners underestimate the amount of awareness raising necessary even among knowledgeable stakeholders much less people who don't understand the issue or aren't even aware the issue exists.

In one partnership we've worked on, the leadership approached a key company to join who insisted they had nothing to do with the issue. After they were shown data that clearly demonstrated how their supply chain had a direct role to play, it still took over a year for them to take action. To address this knowledge/action gap, another partnership we studied employed a communications firm to develop an "executive briefing" composed of just six diagrams (almost no text) that someone could flip through in the back of a taxi on the way to a meeting. Another partnership developed a 30 second animated short film and a documentary short film that went on to win at film festivals. These tools, in the hands of the partners, played key roles in changing the minds of legislators, civil society leaders, and the public.

Practice 3: Repeatedly co-creating and ruthlessly prioritizing

Not every decision needs to be democratic. In fact, one of the hallmarks of a good partnership is the ability of its leaders to quickly and effectively make decisions. At the same time, the more people have a chance to influence a decision or program the more ownership and responsibility they feel for its

Work Planning & Budgeting

What makes a great work plan? How do you develop plans that get implemented? Can budgeting be fun and engaging? Great work plans share these characteristics:

- They're the 80% solution. They're not perfect but they're good enough.
- They build in experimentation. We can't predict the future but we can test it. Most project teams can effectively project out what might happen in the next 90-days and create experiments to test their ability to meet their overall objectives during that timeframe.
- They have majority buy-in by the work team responsible for them. Outside of pure command-and-control environments (e.g., the military) very few plans work if imposed from on-high. That doesn't mean they need unanimity. Giving team members insight into how decisions and priorities get set (not necessarily making the decisions or setting the priorities, just explaining the rationale) and giving them a role in the planning process dramatically improves willingness to work together.
- Take into account stakeholder / target community perspectives. We'll cover more on this below. Suffice it to say, you need to talk to the people you're trying to help.
- Give equal attention to talking about what we're doing and how to do it. We've seen this over-and-over. People like to keep their plans secret until some mythical day when they've got enough results to start talking about them. Oddly enough, the talkers actually get more done. Not the ones who talk a big game and do nothing, but those that talk and do at the same time. Over-communicating also helps with experimentation and getting buy-in from the team, the target population, and other stakeholders. And we don't mean taking credit for things that haven't been accomplished nor do we mean one-way broadcasting. We mean starting and staying in meaningful conversation.

The backbone organization doesn't necessarily create the work plan. The backbone organization creates the enabling conditions for great work planning and provides support as needed. Depending on your partnership skills, you may need more or less support.

For budgeting, we use a number of fun and engaging practices to "gamify" this otherwise tedious activity. We used a variation on Monopoly that has team members assign value to different initiatives based on a set of self-generated criteria linked to likely impact relative to return on investment. Leadership doesn't have to take this analysis as definitive; it can just be advisory.

success. The backbone organization works with the partnership's leadership to pick specific opportunities to co-create with the existing and prospective partners (ideally including representatives of the target population, but always keeping the target population's needs in mind). This also helps the leadership to figure out not only what the partnership should do, but also what it should *not* do. Leadership requires making choices. Involving the partners in making choices and in the process of ruthlessly prioritizing the use of precious partnership resources helps keep the partnership together by both keeping them engaged *and* ensuring a greater ROI on those expenditures. Not every partner needs to be involved in every decision. Pick a few that will have meaning for them.

Principle 2: Driving Long-term Momentum & Growth

The American Society for Association Executives conducts an annual survey of people who join organizations, from local chambers of commerce to international trade unions, to find the answer to one basic question: Why do people join? Year in and year out the answer remains: to be part of something bigger than themselves. Partnerships offer individual participants exactly that, but to keep and hold their interest and involvement, partnerships need to continuously demonstrate their ability to sustain themselves, scale, and have impact. Growing the partnership by increasing its ability to tap into more funding and resources and/or by expanding its membership and influence increases the probability of the partnership's success. The more people, partners, expertise, funding, and other resources a partnership can tap, the more likely it will succeed, scale, and have impact. The backbone organization uses Practices 4-10 to ensure the partnership succeeds by growing and expanding its influence and continually attracting the people and money that amplify its impact.

Practice 4: Fundraising & Partner-raising support

Great partnerships enroll people and organizations in ways that touch, move, and inspire them. They create invitations, choices, and requests that create opportunities for others. That kind of enrollment comes in listening more than telling. Listening to what others need and want and translating that into specific contributions of time, talent, and treasure they can contribute.

While the technical people on the ground in a partnership excel at fulfilling their pieces of the project, they don't excel at enrollment and many are distinctly turned off by the idea of selling. The backbone organization helps leadership structure the different types of fundraising asks, defining what existing and prospective partners get/give to be part of the partnership. The backbone organization supports leadership to think through:

- Governance: the different roles people/organizations can play in the partnership
- Budgeting: how much money the partnership needs from each different type of partner
- Existing strengths and weaknesses: what kinds of in-kind contributions the partnership needs
- Managing in-kind contributions: many organizations want to give more than just cash but the great thing about cash is that it's fungible; managing in-kind contributions takes a whole new level of management, matching particular skills, commodities, etc with specific needs

Example: Too Many Accountants

"At the end of the day," said the superintendent of a mid-sized charter school network in the US, "we still need cash. Skilled labor is great, but it's hard to match up with specific needs. We desperately need help with accounting and finance. But if our partner [large accounting firm], sent us a dozen volunteer accountants next Saturday, I wouldn't know what to do with them." This story, adapted from a roundtable discussion we moderated on skill-based volunteering, highlights the complexities of managing in-kind donations. Unlike fungible cash which can be used for a variety of purposes and holds its value over time, many in-kind donations are single-purpose and perishable: if you can't immediately use them for the specific purpose for which they were intended their value declines or disappears. The backbone organization can help with matchmaking and scheduling to maximize impact and minimize degradation of value.

- Perception: implications of having a new member join (e.g., if they have a good reputation, if they would throw off the representational balance of the partnership, etc.)

The backbone organization provides the training and tools that enable existing partners to have enrolling conversations, explain the available choices, and leave behind concise materials that explain the partnership in compelling ways. This includes defining the donation structure and creating fundraising collateral (print and digital). It also relies heavily on the ability to create ROI narratives (see Practice 7).

Practice 5: Expanding and managing the community of interest

One of the great things about partnerships for social innovation is that they can attract lots of people willing to voluntarily provide help, resources, time, and even money without asking much if anything in return. Partnerships can reach beyond the immediate active partners and create a community of interest made up of people and organizations with some affinity for the initiative. If well managed, this kind of engagement can dramatically multiply impact. If poorly managed, it can lead to lost opportunities or worse to people who actively oppose the initiative because they felt excluded. The backbone organization takes responsibility for identifying, gathering, and coordinating with the community of interest. The backbone organization works with leadership to determine which kinds of organizations should be included in the community, how to reach out and engage them, and what kinds of decisions/input to gather from them. Doing so increases the reach/influence of the partnership by increasing the probability organizations in the community of interest will adopt any initiatives the partnership might produce.

Practice 6: Strategic Partnership Communications

While Practices 4 and 5 focus on growing the partnership, this practice focuses on keeping the existing partners together. As mentioned above, people join partnerships to be part of something bigger than themselves. The backbone organization takes responsibility for ensuring the partners all know they are part of something big by sharing what they and others are doing (see Practice 8 on recognition) and how it all connects and contributes to impact. The backbone organization uses, many of the same techniques for external communications (see Practice 2 and the example on “Going Viral”) but tailors them for internal audiences.

Practice 7: ROI Narratives

Before we had a written language, humans used stories to transfer knowledge. Over the centuries, our brains became wired to remember facts and figures in narratives. That’s why people remember and retell stories[1]. An ROI Narrative creates a concise story that explains how the partnership creates value

> ***Example: The poorly timed press release***
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> After months of careful preparation, we had finally brought together nearly 100 stakeholders on a very delicate environmental and biodiversity issue. Big companies and small companies, government regulators, conservationists, scientists, and trade associations – many of whom definitely did not trust each other – all came together for two days to navigate some very contentious issues. The meeting concluded with a tentative agreement to form a coalition. The next day, several of the bigger organizations issued press releases without prior permission from the other parties. The entire coalition almost came apart. The coalition facilitators had to work hard for three months to keep things together. They worked with members to put in place communication protocols that let people take credit for results and issue public statements, but under specific conditions.

[1] Stay tuned: We explore communications, stories, and story-telling, especially for data and metrics, more below.

for individual partners and how it measurably improves the condition of the target population. The backbone organization does the work of gathering the facts and figures (as explained in Practice 25 "Highly Shareable Stories") and converts them into vignettes the partners can use in presentations, in digital media, and in fundraising meetings. The ROI narrative provides a compact "time capsule" of the partnership's value, with facts and figures arrayed in a readily retold story with the potential of "going viral".

Practice 8: Acknowledgment & recognition

Some NGO and government leaders think businesses enter into public-private partnerships for the PR. Guess what? They're right. They're not in it for the money so they must be in it for acknowledgement and recognition. Guess what else? Most *people* enter into any endeavor for acknowledgment and recognition. On some level, we're all in it for the PR. At the same time, there's a time and place for everything and grabbing the spotlight at the wrong moment can up-end the partnership.

Practice 9: Giving teams autonomy to prioritize and focus on their interests / specific tasks.

You can have great strategy on paper but if you haven't engaged the implementation layer – middle management, the implementers on the ground, local community leaders – you won't succeed[2]. The backbone organization facilitates the process of giving teams choice and the ability to set their own priorities based on their own interests. Done well, this process strikes the balance between the need to drive toward collective results while letting teams have input into the work planning process. It also creates the conditions for experimentation and innovation.

Practice 10: Creating expectations and conditions for experimentation and innovation

Don't beat yourself up if you make a mistake. Beat yourself up if you make the same mistake twice. When teams set out to truly innovate, by definition, the only way to learn is through trial-and-error. The problem in large, multi-sector collaborations, comes when different teams end up running the same trials and committing the same errors. The backbone organization provides the connectivity to uncover these learning opportunities and ensures the whole group learns as it experiments.

When teams feel they have control over their destiny (because they had autonomy in picking their priorities and tasks) they feel better prepared to experiment and innovate. Leadership creates the environment in which teams feel supported and encouraged to "fail fast, fail forward[3]." How do you "fail fast, fail forward"? Through the agile design and rollout[4] process outlined in Practice 23. The backbone organization supports leadership and connects teams so that lessons learned by one get shared by all.

Principle 3: Partnership Identity

What are the first few things the founders of a new country create? A name and a flag. Often before they finish the constitution or naming all the leaders to important posts, they pick a name and design a flag. A shared name, symbols, and language bind people together. The same is true for partnerships. A backbone organization becomes the keeper of the partnership identity and stewards it using Practices 11-14.

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[2] This Practice is tightly linked to work planning as outlined in the "Aligned people and activities" section.

[3] "Fail fast, fail forward" has become a popular term among startups and entrepreneurs. It generally means to learn from your mistakes and keep trying; learn while doing without giving up

[4] "Agile rollout" refers to the concept of quickly designing products or services and iteratively releasing as soon as possible them for users and other stakeholders test them in real life while actively learning and incorporating their feedback into subsequent releases. Contrast "agile rollout" with "Big Bang" approaches that wait for repeated internal testing prior to releasing to the public. See Practice 22 for more information.

Practice 11: Formally launch & relaunch teams

One of the things that makes multi-stakeholder initiatives (MSIs) complex is the fundamentally "multi-team" nature of the collaboration: rarely if ever are people assigned to the partnership full-time. This sets up a series of stresses and competitive priorities for them. They feel pulled between loyalty to their "home organization" and the partnership as well as to the multiple other teams they may be assigned to for their day job. Moreover, many partnerships experience a constant entrance and exit of members which, "weakens group cohesion and identity, marking it harder to build trust and resolve issues."[5]

To resolve these conflicts, leadership should formally launch and periodically "relaunch" the team. "When fully dedicated to one team, people learn about their teammates' outside lives… [forging] …strong bonds and interpersonal trust."[6] Formally launching the team and getting people to open up about their personal development goals, "encourages people to display some vulnerability (which is practically the definition of trust) and gives members concrete ideas about how they can help one another."[7] Unfortunately, MSI leaders often emphasize efficiency over interpersonal connection and may discount the need to bring people together in person to formally launch a team, "but research shows that team kickoffs can improve performance by up to 30%, in part because they increase peer-to-peer accountability."[8] Lastly, leaders should consider relaunching the team – bringing people back together in person to work on interpersonal connection and on strengthening the partnership (see Practice 14: Working IN and ON the partnership) whenever 15% of the team turns over.[9]

Practice 12: Create symbols, names, traditions, and other partnership branding/identity.

A brand is more than a logo or symbol. It defines who belongs and who doesn't belong. The helps create the brand and then nurtures it into existence. It helps create the traditions – the way members treat each other, how meetings are conducted, how stories are told – that define what it means to be part of the partnership. It coaches members on tactical things, like how to use the logo of the partnership in relationship to the logos of the member organizations, to big things like how to deal with inviting (or dismissing) members.

Practice 13: Explicit and deliberate team-building.

Great teams are made, not born. It takes work, especially in a partnership where the individual participants from the various partner organizations will come and go with some frequency. This isn't "trust falls" and "ropes courses". Real team-building involves getting the partners to learn how to put their issues on the table, use "straight talk" (the ability to speak politely but directly) to discuss them, and actively work ON the partnership.

Practice 14: Working IN and ON the partnership.

When working IN the partnership, the partners work to solve the common problem or advance the

Example: "Just let us work!"

In many of the partnerships we facilitated, working IN the partnership comes so naturally for most people that working ON can get forgotten. Working IN provides so much more of an immediate sense of accomplishment and opportunities for praise and reward that partners, "just want to get down to work…so stop bothering us with all this coordination and partnership stuff!" Only by working ON the partnership, though, will partnerships produce transformative results. If working IN the field could produce transformative results, why bother collaborating? Individual actors working alone could accomplish everything without the hassle of partnership. The backbone organization consults with the leadership to balance their time between IN vs. ON to unleash the power and potential of the collective.

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[5] Source: "The Overcommitted Organization," *Harvard Business Review*, September-October 2017.

[6] Ibid.

[7] Ibid.

[8] Ibid.

[9] Ibid.

common purpose. When working ON the partnership, the partners work to create or improve the way in which the partnership itself functions; the partnership's ability to produce extraordinary results. IN isn't ON and there is no overlap. Working IN the partnership is what most people naturally gravitate to because it's relatively straightforward and what they're used to doing in their day jobs. Working ON is harder because it can feel ambiguous and amorphous. The backbone organization helps coordinate leaders and partners working ON the partnership, organizing what could otherwise be really vague and uncoordinated work[10].

Principle 4: Connected and Aligned People and Activities

Specialization drives productivity while coordination multiples impact. As with Practice 14: IN vs. ON, focus can seem at odds with coordination; people want to "get down to work" without the "bother of coordination." Moreover, unnecessary or unproductive meetings have become the bane of the working professional. To resolve this tension, the backbone organization uses Practices 15-17 to decide how much partners want to work together and helps leadership decide who will do what tasks in return for which benefits. The backbone organization also uses Practice 2 together with Practices 18-20 to provide clear and consistent communications (Practice 2), sharing the burden and taking the lion's share of the grunt work of communicating over-and-over again to multiple internal and external audiences, letting leadership focus on generating the original ideas while the backbone organization maintains consistency and keeps partners engaged from meeting-to-meeting, ensuring effective decisions and follow-through.

Practice 15: Deciding on the degree of integration

Toddlers engage in parallel play. They don't actually play together; they play side-by-side, each engaged in his or her own game, occasionally interacting with the other and modifying their behavior accordingly. As they grow older, children increasingly engage in integrated play; playing together with increasing levels of interaction all the way up through complex team-based games. Partners in a collaboration get to pick what kind of "play" works best for them. They can choose from across a spectrum from "parallel play" where the partners pursue a common objective under a single banner-identity while essentially working separately with occasional check-ins to full integration acting as a unified team. There's no right answer and partners can start with one and move to another. The important thing is to be explicit about it.

If all the partners think they can accomplish their objectives better alone it calls into question the very value of collaborating in the first place. Calling this question can manifest with some partners saying they, "just want to get down to work" and don't want to "bother with coordination" (for more on this issue see Practice 14 and the accompanying example). This may be a sign that some or all of the partners actually don't believe in the value of working together. Collaboration is hard and if in fact the partners can achieve their objectives alone, they should. Focus ("getting down to work") drives productivity. Collaboration amplifies impact. The partners need to assess the degree to which collaboration can amplify *their* impact. Because that coordination involves a transaction cost ("bothering with coordination"), the partners should configure their degree of collaboration accordingly. The backbone organization holds the space to call this question in the first place, creating the room for the partners to deliberately explore and answer it.

[10] For more on "IN" vs "ON" please refer to *The E-Myth* by Michael Gerber.

Example: Unexamined assumptions

Tensions can arise that ultimately undermine a partnership if the partners never examine the degree of integration they need. Imagine a collaboration of six institutions: three companies and three NGOs. The companies all assume the collaboration involves parallel play while the NGOs think it's an integrated team. When Joe from Acme Corp (one of the three companies) takes action by himself without consulting the NGOs, they may question his motives and commitment to the partnership while Joe just thinks he's doing what he's supposed to do. They end up fighting and arguing without ever really discussing the underlying issue because they can't even articulate their different perspectives in ways the others can understand because each has made a set of unexpressed and unexamined assumptions. This can get even more complex if the partnership involves large institutions. While some people think of institutions as monoliths, they are made up of multiple pieces and ultimately controlled by individuals. If Maria, the head of the Latin America division of Acme goes off without consulting Joe, much less the NGO partners, all hell can break loose.

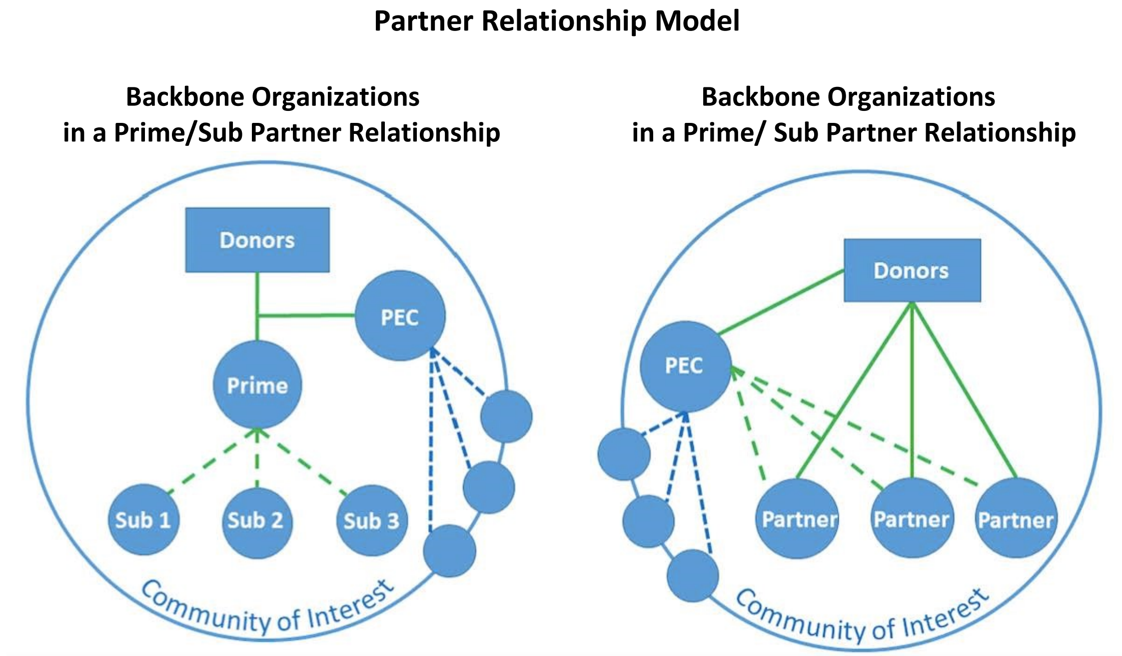
This decision drives what kind of backbone organization the partnership needs. Just like the degree of integration lies on a spectrum so does the type of backbone organization. Figure 2 shows two different points on the spectrum of Partner Relationship Models. These models are two ends of a spectrum between which there can be lots of variants. The prime/sub model illustrates a relationship where one partner takes the lead and creates subsidiary relationships with other partners. These relationships can be formal (e.g., through sub-contracts or sub-grants) or they can be informal (e.g., through memoranda of understanding). The peer-based model illustrates a relationship in which no single entity has the lead. In both models, the backbone organization takes responsibility for coordinating across the various partners and with organizations in the broader community of interest as well as with donors and other stakeholders.

Practice 16:* *Map the team's knowledge & skills

Partnership team members often find themselves suddenly thrust together, which means they don't know each other's strengths and weaknesses. MSI leaders should, early on in the partnership, create a knowledge and skills map. This should address both technical knowledge (e.g., international trade policy), social capital (who has connections where), and softer skills (e.g., complex negotiations experience). Ideally, this mapping should be done "live" (as opposed to behind the scenes) with people describing their knowledge and skills as well as their learning objectives so people get a real texture for who knows what and who's looking to learn something new. This also helps create a more supportive and learning environment, because "[t]he pride people take in sharing their knowledge and the cohesion fostered by peer mentoring are often as valuable as the actual knowledge shared."[11]

[11] Source: "The Overcommitted Organization," *Harvard Business Review*, September-October 2017.

Figure 2: Partners Relationship Models



***Practice 17**: Helping define/specify member roles, responsibilities, rights, privileges, terms, conditions.*
Who's in? Who's not? What do people and organizations get and give for belonging? How do they all work together? How are decisions made? What happens when someone wants to leave? These items, often lumped together as "governance", can take many forms, from unwritten traditions to structured bylaws. Whatever their form, the backbone organization helps leadership create them, maintain them, and ensure they provide enough structure without inhibiting collaboration. They also provide one of the fundamental prerequisites for fundraising and for maintaining alignment as the partnership scales.

Example: Governance documentation becomes fundraising material
In some of the smaller partnership we've worked on, the founders understand governance intuitively and can get by with very limited documentation. The moment they want to add a new partner, however, they need to provide them with some level of clear, transparent documentation of the give/get relationship. In fact, the boring governance documentation lays the foundation for fundraising and growth. A small investment in the tedium of governance pays off in expanding the partnership and the funder base.

Many people seem to think the typical norms for decision-making in a multi-stakeholder collaboration go out the window; that all decisions become consensus-based or require unanimity or near unanimity. Not so. Collaboration does not necessarily mean consensus. Effective collaborations, in fact, have very efficient decision-making processes and strong leadership. While not every collaboration needs an elaborate document, all need some set of established and acknowledged set of decision-making norms, which most often will result in the creation of decision-making cadre (e.g., governing boards, collaboration leaders, working groups and chairs, etc.). In addition, as the collaboration grows or the people involved turn over, new people coming in will need to receive induction into the agreed upon decision-making rules and processes.

We've typically seen the backbone organization take on varying levels of coordination across different Partnership Relationship Models (see Figure 2):

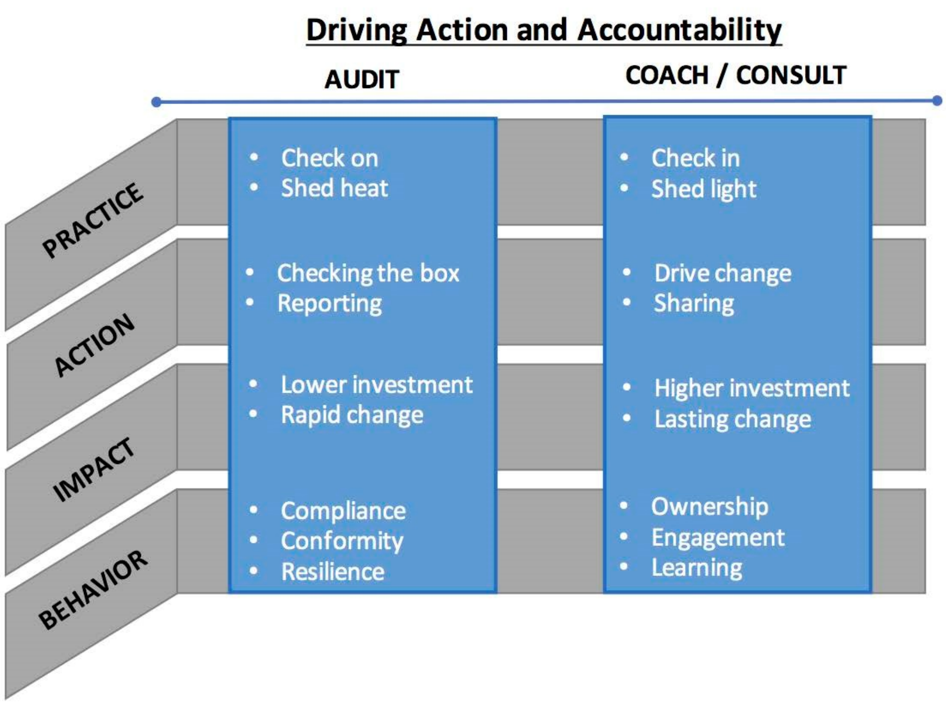
- Agreement management: Helping the partners make and keep their various commitments to each other. "Agreements" may take the form of a written agreement (e.g., a contract or memorandum of understanding) or something more informal (although we recommend written agreements).
- Partnership operations: Providing the "glue" that holds together contractual or agreement-based partnerships on a day-to-day basis.
- Partnership engagement: Keeping the broader/voluntary partners (e.g., those in a Community of Interest and *not* part of the formal contract/MOU) engaged and feeling like they have an active role to play in advancing the common objectives.

Practice 18: Effective and Productive Meetings

Margaret Mead said, "Never doubt that a group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has." And where do you think those citizens did their thinking and planning? They didn't do it over email or sitting alone in their offices. They did it in a meeting. But meetings can be so awful. Especially "coordination" meetings. Lots of people talking past each other, grandstanding, and debating of minutia. How do you make partnership meetings less like "The Office" and more like "The West Wing"?

A backbone organization facilitates great meetings that unleash productivity and pull people into conversations that drive results. These well-run meetings become the foundation of the coordination that ensures the partnership becomes more than the sum of its parts. Figure 3 provides an illustration of the accountability vs. action continuum.

Figure 3: Driving Change



Most coordination meetings devolve into "accountability" meetings, which have their place but over time tend to shed more heat (playing "gotcha games" to get people into trouble) than light (sharing insights that let people go back to work more productive than before the meeting started). The backbone organization provides the structure, discipline, and training for partners to plan more effective meetings, consistently conduct them in ways that drive ownership and engagement, and instills group behaviors and norms that encourage people to help each other and adapt to changing circumstances.

Practice 19: Driving Action & Accountability
As touched on in Practice 18, many attempts at coordination devolve into the bureaucracy of accountability: reporting for reporting's sake, seemingly random data calls, and finger pointing. Executive Leadership should make it a top, early priority to ensure that partners experience the act of partnership in general and the backbone organization specifically as adding value and accelerating their ability to get things done. This means the backbone organization needs to show up as coach/consultant and not as auditor. The backbone organization then needs to create a culture of shared ownership and engagement among the partners driven by active learning and sharing. This approach can take more time but it leads to more lasting change.

Practice 20: Building Institutional Memory & Decision-making
Sometimes partnerships can start to feel like the movie *Groundhog Day*, where the plot seems stuck in an ever-repeating loop: new participants join and ask already-answered questions, decisions get made and repeatedly revisited, progress stalls. The backbone organization provides on-boarding for new partners, documents decisions and reminds the group of them, and it helps run meetings and interactions in ways that still invite fresh thinking without stifling progress.

Principle 5: Involving the Target Population
This can seem obvious: before you try to help someone, go talk to them. Surprisingly, few people actually do. Much of philanthropy over the decades has involved rich people sitting around and deciding what poor and vulnerable people need and then going out and inflicting it upon them. Even those that do set out to involve the target population often don't know how to do engage them in the first place or don't know how to actively incorporate their feedback into their approaches.

One of the main insights to come out of the software development community in the last two decades is a change in the way solutions get developed. Instead of the old "Big Bang" or "waterfall approach" where developers work in isolation from users and then reveal their products in hopes that users will adopt them, Silicon Valley has pushed a much more iterative and agile approach, involving users from the very beginning. Figure 4 graphically depicts the traditional development process and Figure 5 illustrates the agile development process.

Figure 4: Traditional Development Process

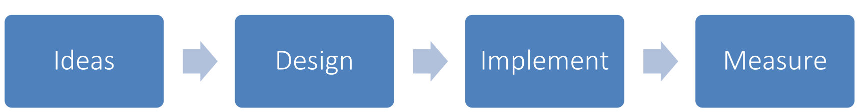
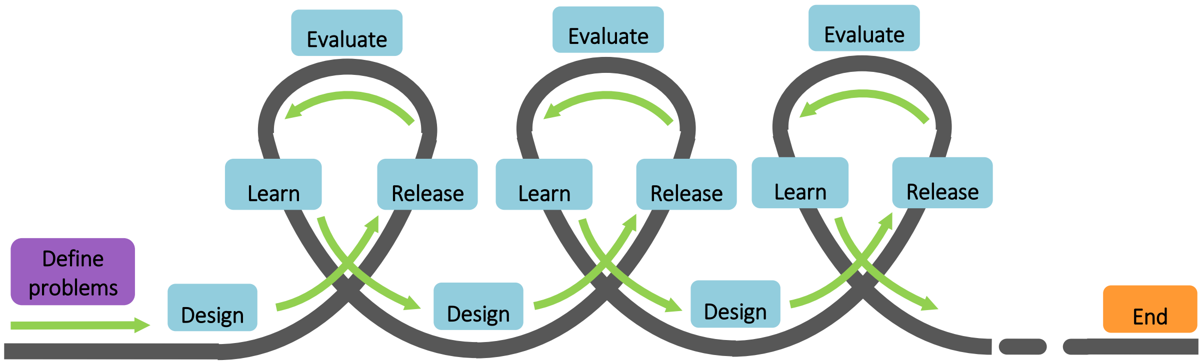


Figure 5: Agile Development Approach



Partnerships that adopt an agile approach improve their probability of success in three ways. First, by falling in love with the problems facing the target population before they fall in love with specific solutions, they avoid the classic cut-and-paste error that afflicts many attempts at social innovation, perhaps most infamously in the PlayPump example. Second, they directly and continuously involve the target population – the best possible source for understanding the problems they face. This both improves the quality of the solution and the probability the target population will actually use it. Third, because the collaborators focus on quickly delivering functional programs instead of comprehensive but delayed programs, they accelerate their time-to-impact. Practices 21-24 help achieve these outcomes.

Practice 21: Understanding what the target population needs and seeks to accomplish[12]

Whether you're trying to help someone escape poverty or trying to help a company become more environmentally sustainable, each has a "job" they want done; something they need of that they're trying to accomplish. When they engage with your collaboration they "hire" you to do that job for them. This holds true for members of the partnership as well as for the people the partnership seeks to help:

- People in the target population are trying to live their lives and the services, products, or other benefits provided by the partnership are one of several ways they may try to improve their lives.
- Partner organizations align around a common mission *and* they still have individual motivations or missions to fulfill with the partnership as one of several vehicles they may use to fulfill them. This is especially true if some or all of the partners are also part of the target population (see below).

As an example, a partnership's overarching might include saving an endangered species in a forest. Forest products companies working in that forest join the partnership, yes to save the species, but more

Example: Avoiding a decision

Often when companies get involved in a collaboration it's not to do something but to avoid doing something: making a decision on their own. In one collaboration we studied, the companies involved faced mounting pressure from consumers and advocacy groups to change a specific business practice that impacted an environmental issue but there was conflicting evidence about *how* to change that practice and even the NGOs in the partnership couldn't agree among themselves. The NGOs thought the "job" was resolving the environmental issue. But the "job" the companies wanted solved was for someone else with more expertise and credibility than them to tell them how to change their business practices.

[12] Some of the ideas in this practice are adapted from a 2016 *Harvard Business Review* article by Clayton Christensen, et al. "Know Your Customers' 'Jobs to Be Done'".

pointedly for them, to keep protesters off their doorstep[13]. People living in the communities around the forest join, yes to preserve the species, but also to preserve and improve their ways of life.

The backbone organization's job is to help the partners and the target population make progress while addressing any anxieties or especially any underlying inertia ("we've never done that before" or "we've never done it that way before") that might hold them back – and eventually help them own the initiative themselves. Often the choice is between doing something or doing nothing – which has a lot of appeal. Here are a few questions you can ask yourself to get started:

- <u>What circumstance is the target population trying to overcome?</u> What problem are they trying to solve? What barriers do they face in solving it? Put yourself in their shoes. Of course, the best way to do this is by talking directly with a statistically valid sample of them. If you can't do that, consider creating "personas", holding focus groups, or doing ethnographic research on them. But don't just satisfy yourself with basic data or even with correlations in the data. Try to dive deeper into a real understanding of their problems. As illustrated in the "Avoiding a decision" example, often what may appear to be the presenting problem isn't the actual problem the target population wants solved. Good collaborations solve problems that formerly had only inadequate or no solutions at all.
- <u>What obstacles must be removed?</u> What's keeping them from changing their behavior? Are there social conventions, traditions, or other pressures that keep people from taking action? The choice often is *not* between various options but instead between doing something and doing nothing. If so, it doesn't take hitting much of a bump to keep the status quo in place.
- <u>What are the social, emotional, and functional dimensions of the job?</u> Are they trying to live up to some community or peer pressure? Do they have conscious or subconscious emotional needs or pride they're trying to live up to? What technical specifications do they need to meet? Some individuals or organizations will take a particular action in order to fulfill on some perception they have of themselves. Maybe they see themselves as a leader of a particular community or as the resident skeptic. How can you help them live up to their own image of themselves?
- <u>How can you develop leadership in the target population to eventually replace the partnership?</u> Who do people already trust and turn to for advice? How might you enroll them early and often? Could you have them co-create the initiative with you? When can you seek their input and have them gather input from others? Collaborations that fail to enroll leaders in the community get stuck in an "inflictor/inflicted relationship" with their target populations.

Answering these questions can help you get to the bottom of the job they want done. Again, it's best to answer those questions with them. For tips on how, see Practices 21-23.

<u>Example: The Commitment Conundrum</u>

Organizations like the Clinton Global Initiative have led the way in getting companies to commit to making changes or donating funds. This formula has become very popular among multi-sector initiatives and for good reason. It often works. It works especially works well for leaders: companies or organizations that see themselves as leaders of their industry or community. It works less well for "fast followers": the much larger group of companies that want to do good but don't know how. The "job" they need done is filling in the blanks; helping them figure out the specifics of changing a business practice, engaging with NGOs, or otherwise changing their behavior. Partnerships that can fill in these specifics will have a much bigger impact because they'll reach a much bigger pool of companies than those that just focus on the leaders.

[13] Note that in this case the companies are *both* partners in the collaboration *and* part of the Target Population because the partnership needs them to support the effort and it seeks to change their behavior.

***Practice 22:* Constant and focused co-creation**

While not every decision needs consensus, iterative design and implementation maximizes the amount of information learned per dollar spent, ultimately leading to a better outcome. The backbone organization helps determine the right balance of co-creation and target population input and helps the partners drive this more iterative approach, transferring key skills in adaptive design and management to both the partners and the target population in the process.

> ***Example: A modular approach to curriculum development***
> Creating a new training class? Don't develop the curriculum. Write an outline and convene a small group to give you feedback. Don't create the whole class. Create a module and then get a group of "beta-testers" to go through it.
>
> Many people know how to get people who work for them to perform. Command-and-control hierarchies between employers and employees, and primes and subs work very well. In partnerships, where the organizations and individuals may ignore new initiatives or even walk away at any moment, the backbone organization drives constant co-creation with the target population to bind the partnership closer together.
>
> In one partnership, the target population consists, in part, of employees in some of the partner organizations. The partnership needs to train them to perform specific tasks related to the partnership's mission. These employees, however, have highly technical, time-sensitive jobs. Giving them one more thing to worry about won't go over very well. The backbone organization helps the partners incorporate this new training into existing training programs and rapidly test its effectiveness using agile design. By involving the employees in the design of these training programs – especially the middle managers who will ultimately have responsibility for overseeing its effectiveness in the field – the backbone organization helps drive higher levels of adoption. Done right, the backbone organization amplifies the partnership's impact beyond the individuals and organizations immediately involved to a broader sphere of influence as other organizations emulate the "beta-testers".

***Practice 23*: Outreach & engagement (surveys, focus groups, co-creation/design)**

Often great managers and doers do not excel at interacting with target populations. They know how to get stuff done but their pride in ownership can inhibit their ability to effectively gather user input. The backbone organization comes armed with specific practices (user focus groups, co-creation/co-design methods, human-centered design-thinking, surveys, and other tools). The backbone organization can either train partners to conduct these programs on their own or can run them on their behalf.

Often, trade associations will represent companies in partnerships. Working with them offers a form of focus group in-a-box, letting you consult one person representing the views of many. This can work very effectively but keep in mind that trade associations want to preserve the status quo, resisting change on behalf of their members – especially any change that incurs more cost or slows down trade. So do both: work with trade associations while also regularly and directly engaging with their members.

***Practice 24:* Agile design & rollout methods & tools**

An effective backbone organization uses agile design and rollout to slow down time and speed up productivity. By breaking down long-term plans (e.g., two to five years) into highly focused short-term increments (e.g., less than six months), the backbone-enabled agile approach illustrated in Figure 5, lets teams intensively focus and drive realistic outcomes in the short term while maintaining focus on long term objectives. Rapid prototyping, one of the agile Practices, accelerates adoption by including the target population at every step in the process, ensuring a better and more readily adopted solution. As illustrated in Figure 5, short time scales are integral to iterative and agile design. After laying out mid-term (e.g., 12-18 month) goals, the backbone organization helps partners break work down into "design sprints" with deliverables due in shorter (e.g., three to six month) increments. The backbone organization also helps the partners learn from each design sprint, gathering and sharing the lessons across multiple sprints ensuring the ability of the partnership as a whole to learn and to communicate its learning and insights internally and externally.

Agile design and rollout also provides a structure for:

- Early wins: The backbone organization can help the the partners focus on quickly deploying high-impact programs that deliver something tangible to the target population, giving leadership and stakeholders a reason to believe that success is possible.
- Pilots (and avoiding pilotitis): Partnerships need to balance the need for testing showing progress with the cut-and-paste fallacy. The backbone organization helps partners avoid letting perfect becoming the enemy of the good, giving them the tools they need to identify pilot projects and then carefully selecting lessons to be tested at future sites with a focus on what can actually be scaled and what needs additional adaptation.
- Achieving Scale: An effective backbone organization can ensure that the partnership is optimized and impactful by helping to drive the partnership to achieving scale that matters.

Principle 6: Clear Measures of Success Connected to Learning

Metrics tend to proliferate. Why measure one thing when you can measure a dozen? Because when you measure everything, you measure nothing. The backbone organization facilitates the partners in developing a "balanced scorecard"[14] of the fewest, most critical metrics and then turning those into active learning and intelligent action using Practices 25-27.

[14] Robert Kaplan and David Norton originally articulated the concept of a "balanced scorecard" for companies in their eponymous book.

Practice 25: Fewest, most critical metrics

Partnerships often have multiple initiatives running at any given time, each of which may have its own battery of measures. The overall partnership needs a tightly constructed "balanced scorecard" that pulls in data from across the different initiatives to give leadership and the target population a concise picture of the progress the overall partnership has made in achieving its mission. The scorecard should address a results chain covering inputs, outputs, outcomes, and impacts.

Example: Contagious Success

Consider a partnership designed to improve community health by inoculating children against a virus. Its results chain might cover:

- Inputs: effective use of resources, namely the people, money, assets, and other contributions provided by the partners to run the initiative.
- Outputs: the ability to produce specific items necessary for accomplishing outcomes using those resources, e.g., an inoculation.
- Outcomes: a material improvement in a specific condition of the target community, e.g., a reduction in illnesses caused by the disease over a given time.
- Impact: material and sustained improvement in the overall condition of the target community, e.g., an improvement in the health and well being of the community's children over a longer period of time.

A typical scorecard includes measures of:

- Impact on the target population: How well the partnership improves the overall condition of the target population, e.g., the material and sustained improvement in child health and well being.
- Partnership effectiveness: An assessment of the processes, procedures, functions, and working relationships of the partnership, e.g., how well the partners worked together to deliver inoculations.
- Finance: Measuring the fiscal health of the partnership, e.g., performance-to-budget, cash flow, fundraising pipeline, diversity of donor base.
- Learning & Growth: How well the partnership uses data to adapt and improve, e.g., adjustments made to the inoculation program during design and roll-out.

The backbone organization provides the structure, discipline, and "glue", facilitating the creation of the critical measures that will make up the scorecard, communicating what they are, how to gather and report progress against them, and providing guidance on how to interpret and learn from them.

Practice 26: Highly shareable stories incorporating measurement data

Only some of us are highly numerate. While most of us would claim some level of literacy, only a few of us would claim a high level of numeracy – a real facility and comfort with numbers. The numerate tend to dominate data and measurement functions, which means they tend to produce information and reports for other numerate people, not for the rest of us. To close this gap, the backbone organization produces narratives. Humans naturally think in, more easily recall, and therefore more easily share stories. The backbone organization translates data and produces narrative arcs. Any good story tells of a hero who sets off on a journey, how s/he encounters and overcomes an obstacle or barrier, and develops a bond with his/her co-sojourners as they achieve their goals. The backbone organization weaves data and analysis into this basic format, bringing data to life and in the process, translating it into a parable or lesson for others. In this compact form, otherwise lifeless data becomes the stuff of war stories, cocktail conversations, blogs, and tweets.

Practice 27: Solution-finding and problem solving

The elite rehearse. All the best athletes, performers, and teams rehearse over-and-over again and they relentlessly study each and every performance, read the reviews, and watch the game-tape. Even among these elite, most focus on their flaws. The very best examine their strengths. A study by the

Corporate Research Council in 2002 showed that in formal performance reviews, focusing on strengths improved employee performance by up to 36% while emphasizing weaknesses decreased performance by up to 27%.

The backbone organization runs these introspection and retrospection sessions mining them for lessons learned and replicable solutions. We use a variety of practices from appreciative inquiry to pre-mortems (trying to anticipate problems before they arise) to after-action reviews. We recommend focusing more on identifying team strengths and looking to address weaknesses by bringing in new partners or individuals rather than trying to "fix" current partners.

Conclusions

The backbone organization provides the nervous system, connecting Executive Leadership's brain to the arms and legs of the implementing partners. Table 2 shows how backbone organization's can fill the gaps that open up between vision and execution. It provides a rough check-list that partnerships can use to assess the effectiveness of their partnerships, even if they don't choose to implement a backbone organization, they can adopt these practices. By implementing a backbone organization, partnerships stand a better chance of actually realizing their visions.

Table 2: Partnership Operating Principles and Practices

Partnership Principles	Backbone Organization Practices
1. Clarity of purpose	1. Align & realign on vision/mission/purpose 2. Clear and consistent communications – easily shareable stories and examples of impact 3. Ruthless prioritization: constant, focused co-creation with equal attention on figuring out what to do and what not *to do*
2. Drive long term momentum	4. Fundraising & Partner-raising support 5. Expanding the community of interest 6. Strategic partnership communications 7. ROI narratives: stories that demonstrate a personal and collective return on people's time and money 8. Acknowledgment and recognition 9. Giving teams autonomy to prioritize and focus on their interests / specific tasks 10. Creating expectations and conditions for experimentation and innovation
3. Strong partnership identity	11. Formally launch and relaunch teams 12. Create symbols, names, traditions, and other partnership branding/identity 13. Explicit and deliberate team-building 14. Working IN and ON the partnership
4. Connected and aligned people & activities	15. Deciding the degree of integration 16. Map the team's knowledge & skills 17. Defining and specifying membership roles, responsibilities, rights, privileges, terms, and conditions 18. Effective and productive meetings 19. Driving action and accountability 20. Maintaining institutional memory & decision-making

5. Involve the target population	21. Understanding what "job" they're trying to do 22. Constant and focused co-creation 23. Outreach & engagement activities (surveys, focus groups, co-creation/design workshops) 24. Agile design & rollout methods & tools
6. Clear measures of success that connect data to learning	25. Fewest, most critical metrics: communicating what they are, how to gather & report progress against them, and how to learn from them 26. Highly shareable stories: data analysis & interpretation, shared value ROI narratives 27. Solution-finding and problem solving: lessons learned and replicable solutions (appreciative inquiry, pre-mortems, after-action reviews)

In establishing a backbone organization, executive leadership will face a challenge from the implementing partners. They will never vote for more facilitation and coordination – just as they will never vote for more executive oversight from leadership. Partners may see this as unnecessary, especially at first, because effective facilitation and coordination are like military intelligence: they're notable when they fail; unnoticed when they succeed. Implementing partners will likely attribute the backbone organization's success to their own ability to work well together. Only when it doesn't work, when coordination breaks down and balls get dropped or partners start to fight with one another, will people "miss" the backbone organization. Executive leadership, which often to this point has probably had to do a lot of compromising with the implementing partners to keep them "inside the tent" will now need to take a forceful hand in insisting on the creation and ongoing funding of the backbone organization.

This can be an especially painful moment if money used to pay for the backbone organization seems to take away from "direct mission" work. In our experience and from our research, however, investments in the backbone organization pay off at the rate of three to four to one in long term mission success and impact – especially when the backbone organization does its job of keeping the target population engaged. If executive leadership can successfully navigate this initial challenge to its authority and the establishment of the backbone organization, the odds of success go way up. It's worth the fight.

