



compassionate
communities

Sustainability Guide

Welcome Community Champion!

On behalf of Pallium Canada, we would like to thank you for the continued interest in the Compassionate Communities movement and for your work to increase the capacity within your community to support those dealing with palliative care experiences like caregiving, serious illness, dying and grieving.

Palliative care is everyone's business, including you, the communities you are supporting and healthcare professionals who all have a role to play to provide palliative care to every Canadian.

This Compassionate Communities Sustainability Guide has been designed in collaboration with current Compassionate Communities across Canada. This guide aims to help your Compassionate Community become more sustainable and help it grow and deliver the desired community impact for years to come. This guide covers key topic areas every Compassionate Community initiative should think about and plan for. Within each topic area, we have included best practices that increase community-led initiatives' sustainability and tools to help you implement the best practice.

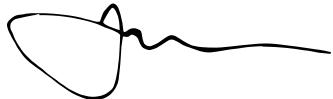
Here are 3 key things to keep in mind as you review the guide:

1. Use the best practices to guide your work but remember you can adapt them to meet your unique community needs.
2. Your initiative will continue to evolve, so refer to the guide to access different tools and best practices when you are ready for them.
3. Change takes time. It is a marathon, not a sprint.

This guide is thorough, which means it is long. To help manage the length, we have broken the guide into two parts. Part one covers three specific areas that all initiatives should be thinking about from the start. The second part includes areas that are important but at different times throughout the initiative. Our intention is to ensure you review part one and engage with part two as needed — to help you stay on track.

We encourage you to spread the word about the Compassionate Communities Sustainability Guide. Please direct people to our website to download the latest version as we will be updating this guide regularly.

We look forward to your engagement and seeing how your Compassionate Community continues to develop!



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Health Canada Santé
Canada

Introduction and Background

Welcome to the Compassionate Communities Sustainability Guide. This guide will act as a road map to help you increase the sustainability and impact of your Compassionate Community initiative.

The guide is a collection of best practices, case studies, and tools. To ensure the guide focuses on what is essential, we consulted with Canadian Compassionate Communities, international Compassionate Communities, and researchers in community development.

Pallium Canada's mission is to equip all health care professionals and communities with the knowledge and tools to provide palliative care for every Canadian. To achieve this goal, we are focused on strengthening the capacity of health care professionals, communities, and the health care system to ensure that all Canadians have access to palliative care when and where they need it. The Compassionate Community movement is a best practice in engaging and empowering communities to act and support those who are dealing with experiences seen during a palliative care journey (caregiving, serious illness, dying, and grief). Pallium is supporting this movement by mobilizing the community through toolkits, resources, and programs which will support local community champions like you.

Below you will find a list with links to the many resources Pallium has developed:

1. Compassionate Community Startup Toolkit

Designed to increase your understanding of the movement and provide you with tools and recommendations on starting an initiative in your community. The tools will support you during conversations in a one-on-one setting, for example, with the mayor, or in a larger gathering such as a town hall meeting. To learn more about the Compassionate Community Startup Toolkit visit: www.pallium.ca/toolkits/startup-toolkit.

2. The Compassionate Communities Exchange

A space for community champions to exchange ideas, knowledge, and tools related to the Compassionate Community movement in Canada and around the world. Ask questions, share resources, and learn from each other. Join the conversation now: www.theccxchange.ca.

3. Compassionate Communities page on pallium.ca — This page keeps

you up to date on the latest resources and developments regarding the movement. For instance, you will find all the resources that exist to support your initiative. We continue to release more resources to support you and the community. Visit the Compassionate Communities page now: www.pallium.ca/compassionate-communities.

If you are not sure what the Compassionate Community movement is or have not engaged in conversations within your community, please use the resources listed above to help you get started, such as the Compassionate Community Startup Toolkit.

Canadian Compassionate Community Shared Language

DEFINITION OF COMPASSIONATE COMMUNITIES IN CANADA

The Pan-Canadian Compassionate Communities Evaluation Project (lead by Pallium Canada, Hospice Palliative Care Ontario, and BC Centre for Palliative Care) has developed a common Canadian definition for Compassionate Communities in consultation with people leading Compassionate Community initiatives across the country.¹

In the definition below, we understand a community to be “a group of people who have something in common. A community may be people who live near each other, in a city, town, or a neighborhood. It may also be a group of people who have common interests, goals, or experiences, such as co-workers, members of a faith community, or even members of a book club, running group, or online group.”

Please review the following definition to ensure your initiative falls within this definition.

A Compassionate Community is: A community of people who are passionate and committed to improving the experiences and well-being of individuals who are dealing with a serious health challenge, and those who are caregiving, dying, or grieving.

Members of a Compassionate Community take an active role in supporting people affected by serious health challenges, caregiving, dying, or grieving. This can be done through connecting people to helpful resources, raising awareness about life and end of life issues, and building supportive networks in the community.

While each community can adopt its own approach to building a more compassionate culture, there are common guiding principles for Compassionate Communities.

Members of a Compassionate Community recognize that:

- Experiences of serious health challenges, caregiving, dying, and grieving are a **part of everyone's journey through life** and that they can happen at any time.
- Caring for one another through these experiences is not a task solely for professionals but rather is something that **everyone can participate** in.
- They must work towards **equity**, celebrate diversity, and be inclusive of all people.

In addition, in a Compassionate Community initiative, there is clear evidence of two things:

- **The community leads the initiative:** Community members, groups, and organizations work closely together to set priorities for the initiative, lay out a plan of action, and pool existing resources from the community to implement agreed-upon actions. They may even share co-leadership responsibilities.
- The initiative's supportive activities are delivered in the **community settings** closer to people's homes, in contrast to programs and services delivered primarily in clinical care environments.

Use this definition to guide your work, share it to increase potential stakeholders' understanding of Compassionate Communities, and connect your initiative to Canada's broader movement. This can complement any description that you may have for your unique initiative that is equally important to highlight. To see the full definition of Compassionate Communities in Canada, please [click here](#).

CANADIAN COMPASSIONATE COMMUNITIES' STAGES OF DEVELOPMENT

The Pan-Canadian Compassionate Communities Evaluation Project has identified the stages of development for Compassionate Communities in Canada.² Please take a moment to review the stages and determine the stage of your initiative. Understanding the staging of your initiative will help you when planning and when talking to stakeholders and funders. The following section includes a visual representation and description of each stage of development:

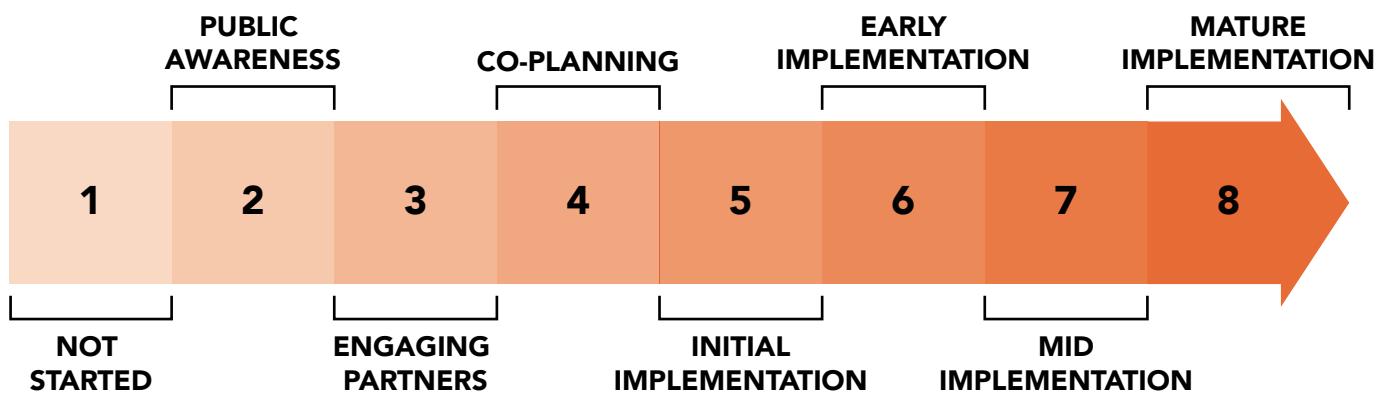


Figure adapted from: Pallium Canada, BC Centre for Palliative Care, Hospice Palliative Care Ontario (2021). Canadian Compassionate Communities' Stages of Development.

FIGURE 1: Canadian Compassionate Communities' Stages of Development

1. **Not Started** — interested in the concept but have not started any activities yet.
2. **Public Awareness** — forming a coordinating group/organization to start up the compassionate communities' initiative.
3. **Engaging Partners** — Raising public awareness of the benefits of participating in a Compassionate Community.
4. **Co-Planning** — engaging potential partners and the community to ensure support and/or commitment.
5. **Initial implementation** — started activities/programs within the last six months.
6. **Early Implementation** — implementing activities/programs within its first year.
7. **Mid Implementation** — implementing activities/programs within its second year.
8. **Mature, stable implementation** — implementing activities/programs within its third year or more.

We encourage you to refer to these stages of development when planning and engaging with the community, stakeholders, and funders. To download a copy, [click here](#).

UNDERSTANDING WHAT MAKES AN INITIATIVE SUSTAINABLE

I. WHAT IS A SUSTAINABLE INITIATIVE?

Public Health defines a sustainable initiative/intervention as “the continued use of program components at sufficient intensity for the sustained achievement of desirable program goals and population outcomes.”³ This means that aspects of the initiative continue to be active to advance the work and achieve the desired outcomes (goals). The sustainability of an initiative does not solely center around funding, but rather a broader focus on leadership, language, community engagement, and more.

II. WHY CARE ABOUT ACHIEVING SUSTAINABILITY?

Your Compassionate Community initiative drives social change in your community, which often takes years or even decades. Therefore, your initiative must remain active over an extended period to achieve its goals. There are important things that you can do and plan for to maximize the long-term sustainability of your initiative.

III. HOW TO INCREASE THE SUSTAINABILITY OF A COMPASSIONATE COMMUNITY INITIATIVE?

Research has shown that there are over 20 factors that increase the sustainability of community-led initiatives like Compassionate Communities.^{4, 5} This guide will help identify and implement the key factors that are important for your initiative.

UNDERSTANDING SOCIAL INNOVATION TO STRENGTHEN YOUR INITIATIVE

I. DEFINING SOCIAL INNOVATION — NEW IDEAS FOR A BETTER WORLD!

The Centre for Social Innovation defines social innovation as “the creation, development, adoption and integration of new or renewed approaches, systems, and methods that put people and planet first.”⁶ These types of initiatives “tackle the root cause or concern by changing the systems that are causing the problem”.⁶ Social innovation is about new ideas or re-imagining existing ideas to create change that leads to a better world.

There are three avenues for change — policy, culture, and markets.⁷ Culture change is the result of changing our minds and behaviours. Compassionate Communities as a social change movement primarily focus on creating culture change at the local level.

II. THE BASICS OF SOCIAL INNOVATION AND WHY IT MATTERS

Understanding the basics of social innovation will help you learn about the stages of innovation and strengthen your Compassionate Community.⁸ There are four stages of social innovation: ideation, invention, adoption, and impact.⁹

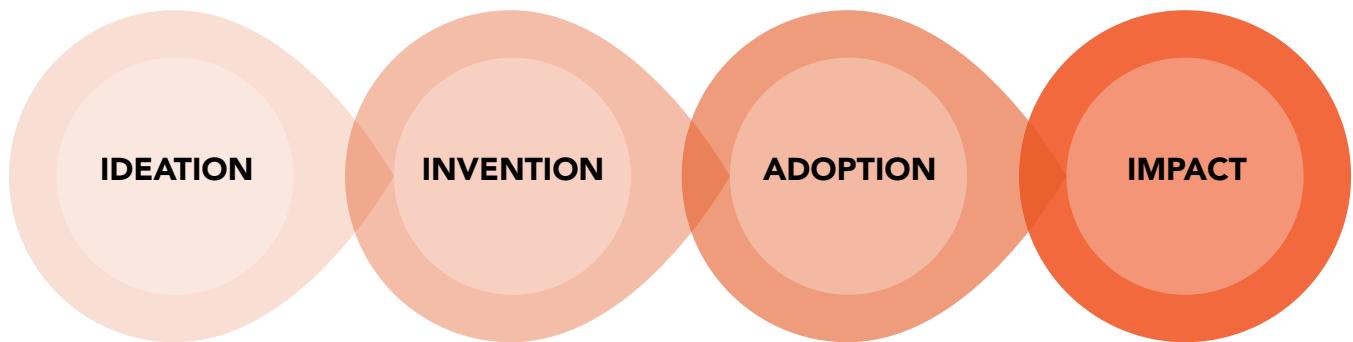


FIGURE 2: Canadian Stages of Development in Social Innovation — Created by Pallium Canada

Ideation — At this stage, an innovator or change agent starts the process of exploring how to address a social issue or concern. This process will include engaging with community members to collaboratively explore how to create the desired culture change and other processes like design thinking, change labs, and open innovation.

Compassionate Community example:
This is the start-up stage of a Compassionate Community, when you desire to increase the support for community members dealing with caregiving, serious illness, dying, and grieving but are not quite sure what to do about it. This stage focuses on talking with community members to collectively explore and move forward with what this initiative would look like and how you will work together to achieve the community's desired change. Pallium's Compassionate Community Startup Toolkit can support you through this stage.

Invention — At this stage, a new or renewed product, process, program, or service creates the breakthrough needed to achieve the desired change. This stage includes the co-creation of how the initiative will achieve the goals and the designing and piloting of potential resources or products in the community for feedback.

Compassionate Community example:
In this stage, the Compassionate Community is becoming more organized, understands the desired change and the community's ability to support this change. The goal here is to brainstorm ideas with the community about how you will create the change. Once you have some ideas, start to test/pilot the activity or program to see if it is achievable and has the desired result(s). This stage may happen over a few years as you create new activities or programs. The Compassionate Communities Sustainability Guide is designed to support you at this stage.

Adoption — This stage aims to take your work (like a program or service) that has shown positive measured results and have it reach more people through “scale and spread.” Your initiative is now becoming a social innovation. You have good momentum and the necessary support within your initiative to be successful.

Compassionate Community example:
At this stage, the initiative has had positive feedback and results from the pilot(s) and has seen continued success. Now it's time to spread that activity or program to more members of the community. This guide can also support you with this stage.

Impact — Now your social innovation has shown a measurable change within the system (community or broader) — for the better!

Compassionate Community example:
The initiative has strong activities/programs driving change at the community level. The desired change is visible, and there is supporting evidence that can be shared. Whether your change is small or large, it is crucial to understand that it takes time to get here — often several years or more. This guide can support you with this stage as well.

III. HOW TO SUCCESSFULLY NAVIGATE THE STAGES OF SOCIAL INNOVATION

Understanding barriers is essential to navigating the stages of social innovation. These barriers can cause an initiative to stall or die when moving from ideation through invention to the adoption stage — known as the most challenging part of innovation. Understanding the barriers will reduce your likelihood of getting trapped in what is known as the “Valley of Death”.⁴⁵

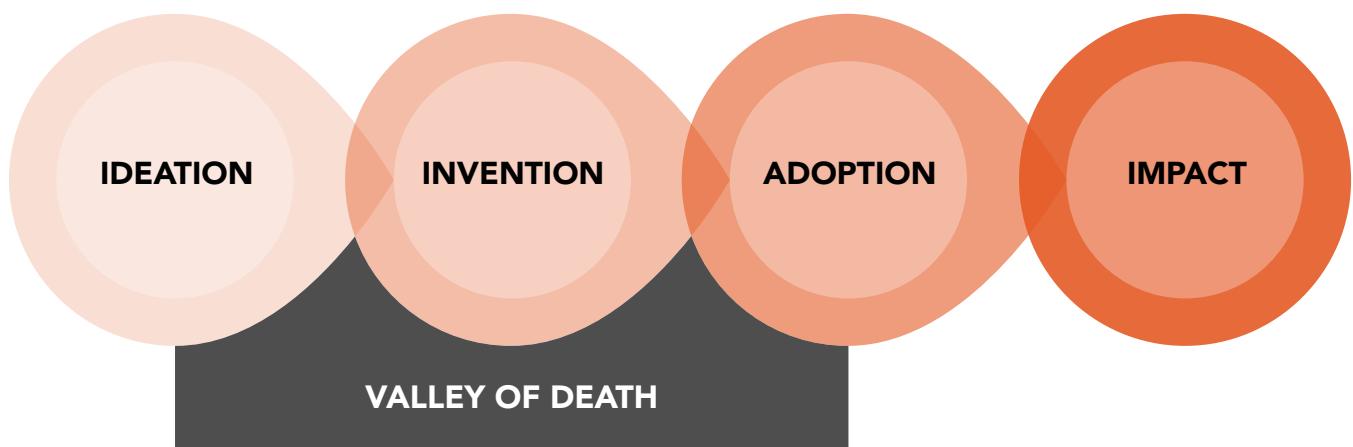


FIGURE 3: Canadian Stages of Development in Social Innovation integrating the Valley of Death from the business stages of Innovation found in the Startup J Curve

Many initiatives do not make it to the adoption stage as they fall prey to typical barriers — which is why this is known as the “Valley of Death” in both the business and the social innovation sectors.^{10,11} Below are some of the known barriers to survival for both social and business innovation. Start thinking about these barriers in the first stage and continue to refresh your thinking as the initiative evolves.

The barriers include:

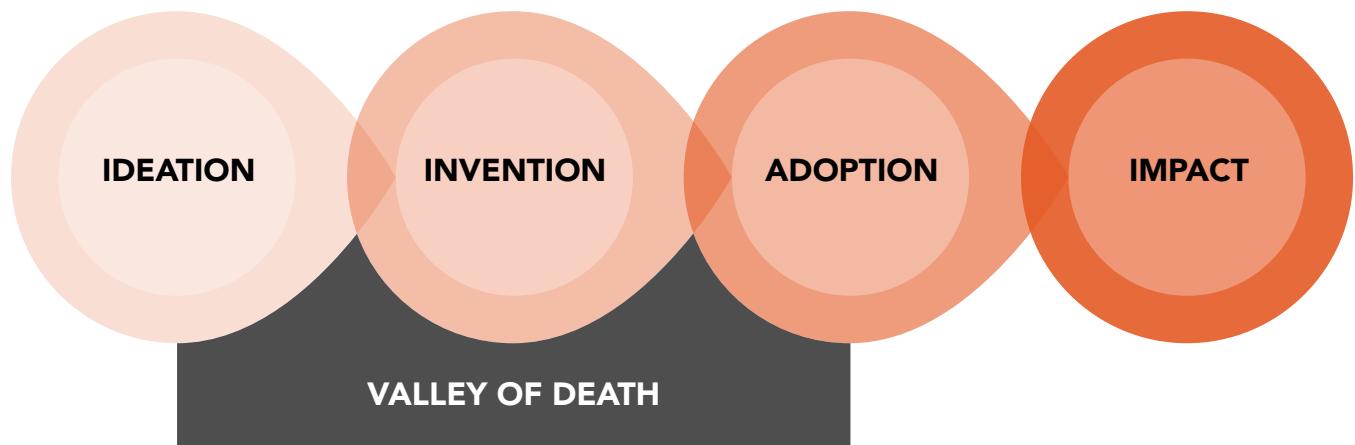
Leadership — Often, only one person (champion) drives the work in the initial stages. The initial stages are a lot of work. When only one person is leading the initiative, there is a high burnout rate. If that person steps away — often everything stops!

Planning — Is crucial as it will strengthen the organizational structure and give a shared understanding regarding the initiative and its goals. Create plans for the following areas: the leadership team and their workload, funding, measurement (evaluation), desired goals for the innovation and how you will get there, and engagement with the target audience (the community).

Feedback — Feedback is a gift. Rarely is an initial product, program or idea perfect. Feedback will allow you to adjust to meet the needs of the target audience better.¹² However, often, the feedback they receive from stakeholders, partners, and target audience are not applied to their innovation, activity, product, or program.

To help you understand where your initiative is and the potential barriers for that stage, we have aligned the stages of social innovation with the Canadian Compassionate Communities' Stages of Development. Take a moment and reflect on the following visual and decide on your initiative's current stage. If you cannot remember the details of each stage of the Canadian Compassionate Community model, have a look at [page 10](#) before looking at the models below.

STAGES OF SOCIAL INNOVATION MODEL



CANADIAN COMPASSIONATE COMMUNITIES' STAGES OF DEVELOPMENT

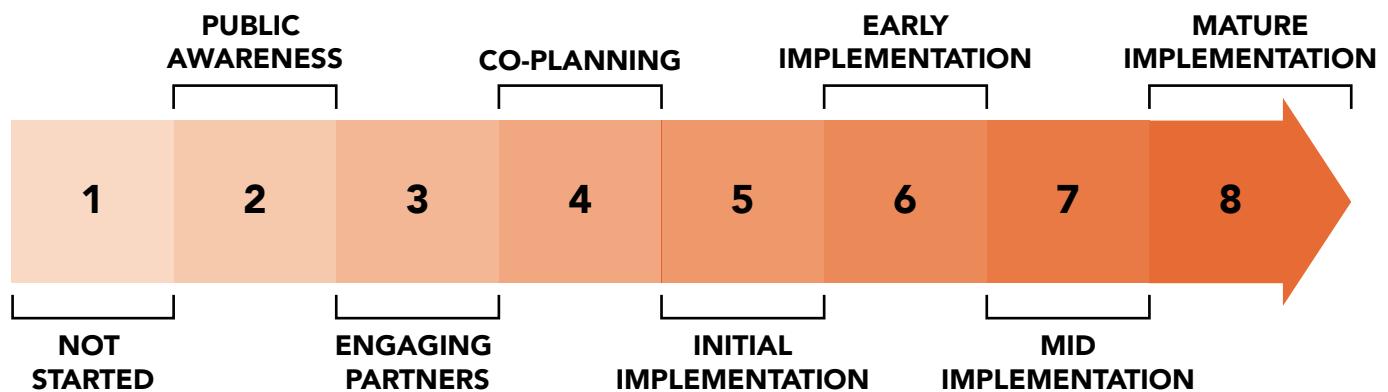


FIGURE 4: Comparing the Canadian Stages of Social Innovation Model with an adapted version of the Canadian Compassionate Communities' Stages of Development

Part 1: Three Key Focus Areas to Create a More Sustainable Initiative

In part one, we focus on leadership, language, and community engagement as they were identified as fundamental to your Compassionate Community's success by our Subject Matter Experts. If you read nothing else from this guide, understand that focusing on part one will increase the success of your initiative and the impact on your community.

LEADERSHIP

Leadership within a Compassionate Community initiative is critical. It can be guided by formal or informal structures and requires a variety of personalities to be involved. Researchers have described leaders of community-led initiatives as superheroes, often volunteering and sharing their experiences and connections. Read through this section to learn the value of having a leadership structure and how to strengthen this role.



I. WHAT IS MEANT BY LEADERSHIP?

For this guide, when we talk about leadership, we are referring to members of a team focused on leading and supporting the initiative through the stages of change. This team provides a supportive structure to the initiative.

II. WHY FOCUS ON PUTTING A LEADERSHIP STRUCTURE IN PLACE?

A leadership team is a key factor for increasing the sustainability of community-led initiatives, access to funding, and achieve community impact. A best practice is to form a leadership team right away.

For community-led initiatives such as Compassionate Communities, community members must make up the leadership team to drive the desired community change.⁵ Research shows that not having a leadership team in place puts the initiative at a high risk of stalling or ceasing to exist.^{10,13} Often initiatives like this start from one or two people (champions) who see the value, but this risks champions experiencing burnout. Therefore, putting a team in place will help spread the workload among several people — reducing burnout and increasing the team's ability to take on additional tasks. In addition, having a leadership team in place showcases organization, focus, and a greater chance of success which can lead to easier access to funding.

III. HOW TO CREATE OR STRENGTHEN THE LEADERSHIP TEAM WITHIN YOUR COMPASSIONATE COMMUNITY INITIATIVE

Before we get into the details of a leadership team, there are two important principles that should guide your leadership team:

- **First principle** — The leadership team should take a stewardship approach. This means the leadership team would put their service for the cause ahead of their self-interest. Peter Block defines stewardship as “overseeing the orderly distribution of power.”¹⁴
- **Second principle** — As the initiative grows, the leadership team will move from being the face of the initiative in the initial stages to the background — now, community members are the face of the initiative.¹⁵ For instance, in the beginning, the leadership team is busy meeting with people from the community, hosting community meetings, meeting with potential funders, and helping the initiative get organized and off the ground. Over time, the Compassionate Community has a stronger network of community members leading the work. The leadership team is now more focused on supporting the initiative, doing fewer public meetings, and leading fewer activities and programs.

If you do not have a leadership team yet, review the leadership structures below that are common in community initiatives like yours. These structures include formal, such as a board of directors, and informal, such as a steering committee or coalition. As your initiative grows, you might find it helpful to create sub-structures to focus on specific areas, which we have included.

The following are different leadership structures and things to consider when deciding which one is right for your initiative.

A. Types of leadership structures

Coalition¹⁶

- A large group
- Emphasis is on action through advocacy
- No specific roles or guiding structures
- Decision-making and leadership is shared

Collaboration¹⁶

- A large group
- Use consensus to make decisions
- Focus is on sharing:
 - Resources
 - Benefits
 - Risks
- The structure has high trust and productivity due to everyone sharing their resources.
- This structure requires full collaboration; therefore, it is not ideal for new initiatives and partnerships.

Steering Committee

- It consists of the people who are first involved with starting an initiative.
- It steers an organization or committee at its inception.¹⁷
- Dissolves once the initial work/planning is complete and can move to a different leadership structure such as a board of directors.

Advisory or Supporting Committee

- This group focuses on ensuring necessary guidance, support, and resources are in place.
- Act as a guide for the organization through its members' knowledge of the community and may or may not have any decision-making power.

Action Committee

- They bring about specific changes in programs, policies and, practices.
- Usually formed around specific topics the initiative will be working within.
- Members carry out the actions to achieve objectives and get feedback from community members.

Board of Directors

- Functions as a governing body of an organization and does little coordination.
- Typically elects a president or chair, vice-president or vice-chair secretary/clerk, and treasurer.
- Works with staff to set policy and oversee the functioning of the initiative.
- Legally responsible for all actions of the organization, making sure the mission and goals of the initiative are maintained.

Task Force

- A group of people who work together around broad objectives.
- Members are chosen based on their interest or experience with a shared issue.
- An initiative may have multiple task forces to address different objectives of the initiative.

Once you have decided on the type of leadership structure, create some guiding rules to follow for the group. A "terms of reference" document can capture this type of content. This document will cover topics like the committee's structure, how often you will meet, who takes notes, how decisions get made, and what the individual roles are and their responsibilities.

It is important to remember that the leadership structure your initiative has will change over time. Therefore, you may come back to this section in the future and pick a new design that is better suited to meet the needs of your growing initiative. The following case study illustrates this concept well.

Compassionate Community Case Study¹⁸

Compassionate Ottawa has used a variety of leadership structures since it started in 2017. Initially, two champions started to explore the idea of a Compassionate Community in the City of Ottawa. Once they saw a great interest in creating an initiative, the two champions (known as co-chairs) moved to create a small steering committee. The initiative also has a larger advisory council in place made up of community members.

As the Compassionate Ottawa initiative grew, the leadership structure became more formal once transitioning to a board of directors in 2019.

To learn more about Compassionate Ottawa's history, visit their website www.compassionateottawa.ca

B. Have a variety of member backgrounds within the leadership team

Ensuring the leadership team has a variety of backgrounds is another best practice.¹⁹ Including people from different backgrounds will bring various experiences, skills, and perspectives to strengthen your initiative.

C. Planning for change

Once a leadership team is in place, you will need to continue supporting it. This is known as maintaining your leadership team and is a key factor for sustainable initiatives.²⁰ The focus should be on planning for change within the leadership team. Change can happen due to people stepping down (known as succession planning) and adding new members.¹⁹ By drafting a plan to support changes, you will be able to adapt when required. Revisit the plan as needed, but once every year or two is a good practice.²¹

Review the succession readiness checklist below, which we adapted from the article Building Leaderful Organizations to suit the type of leadership seen in Compassionate Communities. If there are areas that you do not have a plan for, start planning now so that when a position on the leadership team is open, the transition will be much easier.

1. A strategic plan is in place with goals and objectives for the near future (up to three years), including objectives for leadership team growth.
2. The leadership team or board of directors assesses the chair/executive director annually on general performance and achievement of that year's strategic goal(s).
3. Based on its annual self-evaluation, the leadership team/ board of directors sufficiently performs its major duties.

4. The chair/executive's reports, based on annual assessment, are seen as accurate.
5. The leadership team:
 - Has a solid team culture in place where members support one another and can reach decisions as a group easily and concisely;
 - Shares leadership of the initiative with the core team (if one exists) in having significant input to all major decisions;
 - Can lead the organization in the absence of the core team; and
 - Has authority to make and carry out decisions within their respective areas of responsibility.
6. Another leadership team member shares important external relationships maintained by the chair/executive director. Think of this as another team member who shadows the chair/executive director's interactions with funders and key community stakeholders. Shadowing a key position will allow a member of the leadership to step into the chair/executive director's position quickly.
7. A financial reserve is in place with a minimum of three months' operating capital.
8. Financial systems meet industry standards. Financial reports are up to date and provide the data needed by the leadership team responsible for the initiative's financial strength and viability.
9. Operational manuals exist for key areas and are easily accessible and up to date.
10. Top program staff have documented their key activities in writing and have identified another staff person who can carry their duties in an emergency.

IV. SUPPORTIVE RESOURCES

A. Articles

Five Key Steps for Building Strong and Sustainable Groups¹⁹

Learn more about creating and maintaining a leadership team for community-led initiatives such as Compassionate Community. This article also covers evaluating your leadership team, which we will cover under the evaluation section.

Building Leaderful Organizations²²

Learn about the three approaches to succession planning within a Not for Profit, including a self-assessment for leaders to determine if they are still the right leaders. The language in this document focuses on an initiative with a board of directors in place; the content will still guide you. See below for the tool related to these resources called Emergency Succession Planning.



B. Tools

Terms of Reference Template

Use this template to create the terms of reference your leadership structure will use. It covers all the key topic areas.

Wheel of Engagement²³

Learn more about how involved people want to be in this initiative. You can place specific tasks on the wheel and let people select where and how they want to engage. Use this tool to find members for the leadership team, support a specific topic area within the initiative, or for community members who want to stay in the loop.

Exploring Our Gives, Gets And Constraints²⁴

Learn more about how leadership team members can better understand what everyone brings to the table, what they hope to get from being a part of the leadership team and identify their constraints. This tool will increase the understanding of why members are involved, leading to a stronger team through the transparency it provides.

Emergency Succession Planning²⁵

Use this document as a guide when someone within the leadership needs to step away suddenly. The roles this guide would apply to is executive director, chair, treasurer, and anyone who holds a lot of key insight about the initiative.

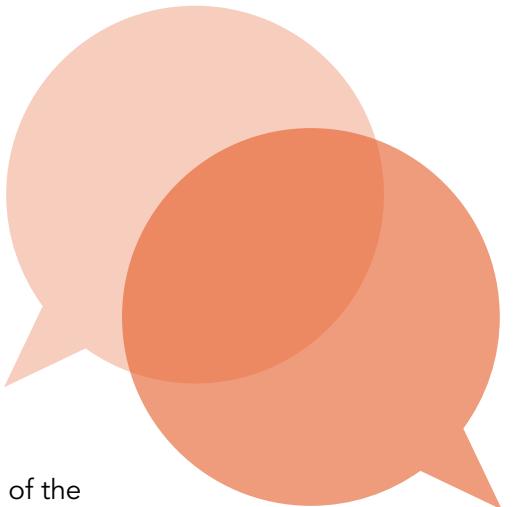
Steering Committee²⁶

Learn more about how to form a steering committee, identifying steps and tools for guiding questions, skills checklist, evaluation tools, descriptions of roles to include in a steering committee and other resources.

LANGUAGE

I. WHAT IS MEANT BY LANGUAGE?

By language, we are referring to how we communicate, whether written or verbal. How the initiative communicates with its current and potential stakeholders is a key area for sustainability.²⁷



II. WHY FOCUS ON ADJUSTING LANGUAGE?

When communicating with stakeholders, it is essential to be mindful of the language you use. By adjusting the language for different audiences, the likelihood of them understanding the message and seeing the value of your initiative increases.²⁷ Suppose you deliver the same message to different audiences. In that case, there is a high likelihood not everyone will understand or value it.²⁷

If a potential funder does not clearly understand the "what" and "why" of your work in a language that speaks to them, they will not relate or be inspired to fund you. Therefore, making a conscious effort to adjust and adopt new communication methods is a best practice to communicate your message effectively.²⁸

III. HOW TO ADJUST YOUR LANGUAGE FOR DIFFERENT STAKEHOLDERS

When communicating, think about the following: who is your audience and the purpose of the communication? Understanding these two pieces will help you decide on the formality needed and the tone you should take.

Here are things to consider regarding the audience, purpose, formality, and tone:

Audience: Who will most likely review this piece of communication?

- **General** — This is usually the public who have little to no knowledge of the topic.
- **Knowledgeable** — This audience may have a post-secondary degree or is familiar due to having experience with this type of community initiative.
- **Expert** — This audience may have a higher education level or have a detailed understanding of the topic and/or social change initiatives.

Purpose: What are you trying to achieve with this piece of communication?

- **Inform** — You want to make someone aware (e.g., an awareness campaign about advance care planning).
- **Describe** — You are trying to explain something (e.g., what is a Compassionate Community).
- **Convince** — You are trying to sway someone to do something (e.g., provide you with funding or become a partner).
- **Tell a Story** — You are sharing an experience (e.g., talking about the impact of the Compassionate Community initiative within the community).

Formality: How formal should the communication piece be to resonate with the audience and suit the purpose?

- **Informal** — This communication is usually casual (e.g., communicating with someone from your leadership team).
- **Neutral** — This communication is not casual or formal (e.g., responding to an email from one of the initiative's volunteers).
- **Formal** — This communication is formal with little jargon or emotion, and with proper salutations. It is often used when first trying to connect with someone or an organization (e.g., apply for funding, trying to connect with the mayor, trying to connect with local doctors).

Tone: This is the feeling you want to leave the audience with after reading or hearing the communication.

- **Confident** — You are sure of what is being communicated (e.g., the need to start a Compassionate Community).
- **Optimistic** — You are hopeful (e.g., when sharing the impact your Compassionate Community will have with a funder).
- **Urgent** — You want the audience to understand that this can't wait any longer (e.g., supporting those who are caregiving in the community).
- **Friendly** — You are trying to communicate in a manner that is warm and trustworthy (e.g., when recruiting community members to engage or volunteer).
- **Respectful** — You are creating a communication piece that shows respect to the audience (e.g., you are drafting a communication piece that speaks about the role of caregiving — you would want to acknowledge the caregivers' dedication).

Here are some examples of how to adjust your language for different stakeholders:

Stakeholder	Community members
Communication tips	<p>Speak to impact by creating an emotional connection (e.g., share a story) and minimal statistics, using plain language with no jargon or abbreviations. This should not be overly formal in language — you want them to feel at ease to ensure the communication feels friendly.</p>
Example — Why they should support this Compassionate Community initiative	<p>A Compassionate Community has members who feel more comfortable supporting those who are caregiving, serious illness, dying and grieving. If we look specifically at caregivers, we will learn that a caregiver provides 80% of the care provided to a patient in the last year of life while the other 20% is provided by health care professionals. 1 in 5 caregivers have expressed their health had suffered while caregiving. Do you want to help ease the load on the caregivers around you? If yes, help us create a more Compassionate Community so more community members are empowered to help caregivers.</p>

Stakeholder	Health care professional
Communication tips	<p>This audience is highly educated. Be formal, confident, and ensure to address them by their correct title/salutation (e.g., Dr. Smith) when communicating. When creating buy-in, make sure to include more statistics and minimal emotion.</p>
Example — Why they should support this Compassionate Community initiative	<p>In Frome, England there was a research initiative with the health system and the community using a Compassionate Communities approach. The goal was to reduce the unplanned emergency admissions. The engagement of the community to support patients who were flagged and their family, reduced unplanned emergency admissions by 14% in 3.5 years.²⁹ During this research, they compared their results with a neighbouring community, which increased by 28.5%.²⁹ Physicians who participated in this research also noted increased job satisfaction. This research demonstrates the community has a role to play, which can positively impact the health care system and the life of a patient.²⁹</p>

Stakeholder	Mayor
Communication tips	<p>This audience will likely have a post-secondary degree but may not be knowledgeable about community-led initiatives. Make sure they understand the basics first. When communicating with them, be formal (at least at first until you get to know them better) and show them respect. Be confident and hopeful when communicating with them. When you are trying to create buy-in, use a combination of statistics and emotion (stories). Speak to the impact on the community.</p>
Example — Why they should support this Compassionate Community initiative	<p>Dear Mayor Smith,</p> <p>Thank you for meeting with us today. We wanted you to be aware of an initiative that is starting in the community that focuses on supporting people who are caregivers, dealing with serious illness, dying, and grieving. This community-led initiative is called a Compassionate Community, an international movement focused on helping people be more comfortable talking about and supporting others who are dealing with these experiences. As you may already be aware, that the percentage of seniors making up the Canadian population is increasing — from 16% in 2010 to 24-28% by 2032. Naturally, that means we are going to see an increase in community members who are caregivers, or dealing with serious illness, dying or grieving.</p> <p>We have had a few meetings to see if there is an interest to support this initiative and we have had a very positive response — therefore, we wanted to meet with you right away. We wanted to make sure you were aware if you have community members asking about this initiative.</p> <p>Do you have any questions? Can we leave you a factsheet in case you need it in the near future?</p> <p>Thank you for your time as I can imagine your schedule is very busy. If you think of anything that might be of interest to this initiative, please reach out.</p>

Stakeholder	Funder
Communication tips	<p>With this audience, they could be educated but not be aware of your work. If it is clear they do not know about the Compassionate Community movement, ensure they understand the basics first. Use formal language that is confident and hopeful. When it comes to what kind of information you need to share to create buy-in, it is important to look at how they show impact in their reports. Some funders focus more on stories and less on statistics, while others are very statistics-driven. Look at any reports they have released to help you decide which combination of supporting information to include.</p>
Example — Why they should support this Compassionate Community initiative	<p>Dear Community Foundation,</p> <p>We are applying for your X fund to support the development of a Compassionate Community initiative in our community. This initiative is community-led and uses the Compassionate Communities international framework as guidance. The focus of this work is to increase the community's confidence to talk about and support those who are dealing with caregiving, serious illness, dying and grieving because everyone has a role to play.</p> <p>In Canada, the percentage of seniors who will make up the population is expected to grow from 16% in 2010 to 24-28 % in 2032. That means we will have a lot of people who will be caregiving, dealing with serious illness, and dying. In addition, for every person that dies, five people on average are left grieving — which means we will see more people grieving in our community.</p> <p>Within Canada, we have connected with our local supporting organization, Pallium Canada. We use their supportive resources focused on the best practices in Community development to increase our sustainability. We are also aware of the impact other Compassionate Community initiatives are having across the country. Some initiatives are leading sessions to help community members understand and start their advance care planning process. Some are hosting death cafés to help people get more comfortable talking about death and grief.</p> <p>Currently, our initiative is focused on engaging with the community to understand existing program(s), complementary initiative(s), what the concerns are related to these experiences and the desired change. This work is key for community-led initiatives but is also labour intensive. Therefore, we are applying for funding to hire a part-time staff who can help support our engagement with the community. Please see Appendix A to review an overview of this initiative and Appendix B for our budget.</p>

The key to effective communication is to know your audience before creating the communication piece. Understand who they are, their education level, if possible, their area of expertise and more. This insight about the audience will help you adjust the other aspects of the communication to increase their understanding and engagement. Unfortunately, we did not find any supportive tools for this section. However, find people in your community who work in marketing, advertising, or communication — they can lend their expertise to the initiative and help create change.

COMMUNITY ENGAGEMENT

I. WHAT IS COMMUNITY ENGAGEMENT?

Community engagement is the process of actively engaging with the community to inspire action.³⁰ Engagement with the community should consist of various stakeholders such as individuals, associations, organizations, and your local political government. The idea is to engage with as many stakeholders as possible. The more interest and support you can garner, the better.

II. WHY FOCUS ON COMMUNITY ENGAGEMENT?

Planning for and participating in community engagement is noted as a key factor for sustainable community initiatives and is central to successful change.³ Engaging stakeholders in the community can be a huge source of clever and creative ideas specific to the community.¹⁸ This often-untapped source of ideas has the potential to solve the most complex and hard-to-address issues in our communities.³¹ Participating in authentic community engagement is not easy but the benefits will outweigh the work required — for instance, more diverse perspectives, increase trust in those leading the initiative, inclusion of lived experience, shared decision making and ultimately greater ownership from the community to see this initiative succeed and achieve the desired impacts. Therefore, ensuring the Compassionate Community initiative spends a large portion of their time engaging the community will increase sustainability.

Core functions of community-led engagement:

- Three overarching goals of community engagement: informing decisions, building capacity, and strengthening relationships are considered important for community-led approaches.
- These may take time, but they are effective in ensuring community ownership and sustainability.

III. HOW TO STRENGTHEN COMMUNITY ENGAGEMENT PRACTICES

To achieve authentic community engagement, you need to plan. There are several things to think about during the planning process including, the level of public participation (community engagement) the initiative will encourage, decide on the type of pre-community engagement activities you will host, create the initiatives principles for community engagement, think about who, when, and how to engage, planning for potential concerns during community engagement, and assessing the engagement activities.³²

Reviewing the image below to understand the levels of public participation (engagement) and want level is ideal for the initiative.

A. Levels of community engagement

INCREASING IMPACT ON THE DECISION →				
	INFORM	CONSULT	INVOLVE	COLLABORATE
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.
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.

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© International Association for Public³¹ Participation www.iap2.org.

FIGURE 5: Illustrates the five levels of public engagement and the associated commitment

This figure³³ shows five levels of engagement. As the community's engagement increases from left to right, so does the community's impact on decision making. In addition, when moving from left to right, it is important to note that decisions or processes can take more time. On a positive note, the community's trust and sense of ownership will also increase.

Therefore, the initiative's community engagement goal should be to empower as much as possible. Use this image when planning the initiative's level of engagement and when planning for specific programs within the initiative. Your initiative may have different levels of engagement based on what is appropriate at that time or for that program. This figure should be a key resource in your community engagement planning for the duration of the initiative.

B. Pre-community engagement

Pre-community engagement is a crucial step in the initial stages of a Compassionate Community initiative. This step will help you understand the community better regarding existing networks, barriers, and challenges and assess if the community and your initiative's leadership team are ready to support the work. You can use two approaches for this phase — assessing the level of readiness and the pre-community engagement methodology. Assessing the community's readiness is done during community meetings when you first share the idea of a Compassionate Community. The pre-community engagement methodology is a newer concept. Much like assessing community readiness, it aims to prepare the leadership teams for authentic community engagement.³⁴ The information you will learn about the community, its networks, barriers, and challenges to engaging the community will be invaluable when planning your Compassionate Community engagement.³³ Below are the three core steps to complete, as noted in the Spark Report.³³ They will help you gather information, increase trust, and build a unique engagement plan for your community.³⁴

1. Seek to Understand the Layers Within a Community —

Do not assume a community is unified. Follow these four strategies to help understand the layers in your community:³⁴

- **Identify existing relationships within a community —** Starting with existing relationships will help you move faster because you can benefit from the connections and the trust your partners have built with others in the community.
- **Understand community networks —** There is a very high likelihood that there are many community networks that exist but are not well known. Look to people who are well connected in the community to document these networks. This information will be helpful in the future.
- **Understand the history of a place —** Taking the time to understand the history in the community is extremely important. Learn about any previous experiences where the community was engaged on an initiative. This can be done formally through newspaper articles or books, and informally through oral histories provided by members of that community.³⁴ This step will help the leadership team better understand any potential barriers and identify areas where trust may be low.
- **Understand previous engagement efforts —** Become aware of previous methods used for engagement. This information can also shed some light on what went well and what did not go well. This insight is helpful when thinking about barriers and trust in the community.

2. **Understand a Range of Community Members' Perspectives —**
Now that you have a basic understanding of the community, use the current relationships, or create new ones to include more perspectives from different groups. Again, look to find out about barriers and challenges they see regarding engaging the community. This step will also increase trust.
3. **Identify Engagement Strategies that Support Community Preferences —** Here is where you pull all the information you have learned together to come up with a unique engagement strategy for the community. This should be inclusive of the barriers, challenges, and trust issues.

C. Principles for engagement

After participating in the pre-community engagement work, you can use this knowledge to create the initiative's principles for engagement.³⁶ The initiative's principles for engagement should consider the unique barriers, challenges, and relationships of the community.³⁶ These principles will guide those planning for the engagement and implementing the plan.³⁶ Your principles should make clear the kind of engagement you want to have with the community. "A good principle offers guidance, is useful, inspiring, encourages development, and is measurable."³⁶

Here is an example from Tamarack Institute's Creating Principles for Engagement tool:³⁶

- Include everyone and embrace all ideas
- Reciprocal support and respect
- Informed and communicative
- Demonstrate integrity, trust, and transparency
- Measure outcomes and share successes

D. Planning for stakeholder engagement

During the community engagement planning process, you will need to plan for the various stakeholders you want to engage, which can be any individual, association, or organization with a mutually beneficial interest in the initiative. Including this in the planning process will ensure you engage the desired stakeholders, and it is done in an organized way to ensure time is not wasted. Here is a summary of the approaches with a description and when to use them. All approaches have tools included in the supportive resource section.

Approach	Stakeholder mapping
Description	This process allows the leadership team to explore potential stakeholders. This activity can be done at community meetings as well to capture a broader map.
When to use it	Initial stages of your initiative or when you are starting a new direction or program.
Tool name	<ul style="list-style-type: none">• <u>Worksheet: Who Should we Engage?</u>³⁷• <u>Top 100 Engagement — steps 1 and 2</u>³⁸
Approach	Organizing stakeholders
Description	This is when you organize the stakeholders into groups. The groups might be by priority of engagement, sector, diversity, and more.
When to use it	This should be used at the initial stages along with anytime you are looking to add new stakeholders.
Tool name	<ul style="list-style-type: none">• <u>Top 100 Engagement — step 3</u>³⁸

Approach	Planning engagement of stakeholders
Description	This is when you plan for the engagement of potential stakeholders. This is when you pull all the pieces (e.g., the work you have done around stakeholder mapping and organizing of stakeholders).
When to use it	This should be used when getting ready to engage new stakeholders.
Tool name	<ul style="list-style-type: none"> • <u>Top 100 Engagement — Step 4</u>³⁸ • <u>The Engagement Triangle</u>³⁹ • <u>Community Engagement Planning Canvas</u>⁴⁰

The key to remember is that “the process is just as important as outcomes in community engagement work.”³² Make sure you give the planning phase adequate time.

E. Concerns regarding community engagement

Participating in community engagement can be time-consuming, scary at both the individual and organization level, challenging, and have unintended outcomes. Research in this field has showcased that people genuinely want to engage with their communities. However, when people have fears regarding how engagement with the community will go, they are likely to scale back their engagement plan. These fears may include being verbally attacked, fear not having all the information and answers, fear the community will want something that the work might not be able to deliver, fear of not being able to follow through, and fear of disappointing people.

The fears listed above are valid, if you can relate to one or more of these, you are not alone. To move past the fears, first, acknowledge them. Recognize that it is acceptable to feel this way and others may feel this way too. Now, take steps to get more comfortable with that fear. This process will be challenging, but you will increase your skillset, deepen the community engagement, and increase the ownership in the initiative.

There can be many challenges and unintended outcomes the initiative may run into, which can act as a barrier to engagement. Here is a list of potential challenges and unintended outcomes, along with suggestions on addressing them, from the Community Engagement — Challenges, Vulnerabilities and Unintended Outcomes by Tamarack Institute.⁴¹

- **Lack of representativeness** — The engagement does not accurately represent the diversity of the community.

Tip to address — Ensure you offer various engagement activities and think about the uniqueness of the groups not represented.

- **Lack of equity** — Ensure less powerful voices are engaged and not marginalized or tokenized (invited to engage just to “check a box” but not included in a meaningful way).

Tip to address — Take unique approaches such as offering incentives to participate.

- **High expectations** — Often, community members can have raised expectations, which puts pressure on the leadership team.

Tip to address — At the start of the engagement, lay out clear expectations and commitments. For example, state that “not all ideas shared today is guaranteed to become part of the initiative due to limited resources”.

- **Asking too much of community members** — Engaging with the same community members consistently can lead to fatigue and they may step away.

Tip to address — Ensure a variety of members are engaged across all areas. If someone needs to step away, it will not be a reason to panic.

- **Not valuing context experts** — When engaging experts, it is important to include both content (knowledge of theory or practice) and context (knowledge based on lived experience) experts.

Tip to address — Context experts can be impacted by power dynamics such as doctors in the meeting, so plan activities that will allow them to share their knowledge, for instance, privately on paper and not out loud in the meeting.

- **Engagement as a checked box** — This is when the engagement of the community exists only to say that they engaged the community with no plan to integrate the feedback.
- **Potential conflict** — During community engagement events, there is a high likelihood that there will be some conflict that arises. Sometimes, conflict can lead to increased support for the need for the initiative because people are passionate, and that passion can be harnessed.

Tip to address — Try to uncover the root of the issue. This can be done in private or more openly if appropriate.

- **Dissatisfaction with engagement techniques used —**
When engaging you may hear from some individuals that they are unhappy with the techniques used to engage the community.

Tip to address — Ensure you use a variety of engagement strategies so more people can participate.

- **Overbearing participants —** During community engagement events, you could be confronted with a participant who keeps talking and does not let others contribute (known as hijacking).

Tip to address — Ensure the person leading the event is confident, include several ways to contribute besides speaking out loud, create a "parking lot" for ideas outside the purpose of this event and always maintain respect.

As mentioned earlier, community engagement can be scary, but if your plan includes scenarios such as these, it will turn out just fine.

F. Assessing engagement activities

Assessing how your community engagement is going is a good approach as it allows you to see if the plan is achieving what you had intended. This is a form of measurement which can be used to show the current impact. This can be as simple as having an engagement goal for that event or meeting and creating questions to assess that goal.

IV. SUPPORTIVE RESOURCES

A. Articles

Understanding Community-Led Approaches to Community Change⁵

Learn more about the community-led approach, when to use this approach, principles to follow, and how to engage the community.

Community Engagement — A Foundational Practice of Community Change³¹

A broad look at community engagement, why it is vital, and how to engage with the community.

Pre-Community Engagement⁴²

Learn more about the newer concept called pre-community engagement. It includes a case study to show this approach in action.

Let's Talk Community Engagement Podcast

This 22-minute podcast covers the basics of community engagement. You will need to look for the above title in the list of podcasts.

Index of Community Engagement Techniques⁴³

Learn more about the five types of community engagement you saw above and see examples of what that would look like for each one. The document will help you better understand the types of engagement that can be used for each stage.

B. Tools

Community Interest Activity

Use this tool at community meetings to let participants inform you how they would like to stay engaged moving forward.

Select The Level Of Engagement⁴⁴

Learn more about the desired level of engagement by working through some questions. Use this when deciding on the level of engagement for a program or the initiative.

The Engagement Continuum⁴⁵

Learn more about making an engagement plan at the leadership level to clarify the appropriate level of engagement required for each potential group and/or for each project.

The Compassionate Community Index⁴⁶

Use this survey in the early stages during community meetings to assess that community's readiness and commitment to become a more Compassionate Community and during the needs assessment/assets mapping measurement phase.

Community Readiness For Change⁴⁷

Understanding community readiness, dimensions of community readiness, levels of community readiness, and how to use this model.

Community Engagement Planning Canvas⁴⁰

How to focus before you start to engage and ensure you walk through all planning components.

The Engagement Triangle³⁹

Plan engagement from mapping to the best approaches for engagement.

Creating Principles for Community Engagement³⁶

Learn more about creating principles for engagement to think about the needs and relationship you wish you to have with your community. This tool is for you to use during your planning and implementation of activities.

Evaluating Engagement Activities⁴⁸

Use this worksheet to evaluate the success of your engagement activities against your engagement goals.

Part 2: Best Practices to Strengthen Your Initiative for the Future

In this part of the guide, we focus on best practices and strategies to support the initiative's longevity. The topics covered include strategic planning, measurement, partnerships, funding, and building trust. This section will support the initiative as it grows.

BEST PRACTICES FOR COMMUNITY DEVELOPMENT

This section will focus on the best practices to use when increasing the communities' ability to support their members. What is essential when engaging in this type of work is understanding how to lead it, the level of community engagement, and creating strong partnerships. The best practices outlined by the Public Health Palliative Care International Association to strengthen the city's and community's capacity to support those dealing with caregiving, serious illness, dying, and grieving include the following principles: community development, participatory approach, partnerships driven, inclusive of the total population, and focused on the local setting.⁴⁹ Compassionate Community experts encourage local initiatives to use an Asset-Based Community Development (known as ABCD) process to achieve these principles.⁵⁰ Here is an overview of ABCD.



WHAT IS ASSET-BASED COMMUNITY DEVELOPMENT (ABCD)?

ABCD focuses on what the people and community have as assets and strengths.⁵¹ Often community development focuses on identifying what is wrong or weak in a community and build from there. ABCD is a completely different process that will help members create local opportunities to help address the issues or concerns.⁵¹ This approach brings people together and empowers them to create the change they want to see for the common good.⁵¹ This image shows the difference between the traditional process in community development and the ABCD process.



Adaptation of figure
by Bonnie Tompkins

Tamarack Institute notes these key principles to follow when using ABCD:⁵¹

- **Everyone has gifts** — Everyone in the community, either individuals or organizations, has gifts they can share to support this initiative.
- **Relationship-building community** — ABCD is about creating connections that will make the initiative more sustainable.
- **Citizens at the center** — This focuses on the idea that those impacted can strengthen their capacity for themselves and the community.
- **Leaders involve others** — This focuses on making sure many people are involved in creating a strong base for community action.
- **People care** — Listen to community members because although it may appear they do not care, they do. Find out what the interest is and their challenges.
- **Listen** — The decisions made about the initiative need to come from a conversation where people are heard—meaning decisions should not be made “in a silo” but with the people in the community.
- **Ask** — Get comfortable with asking questions and not offering a solution as this is the most sustainable way to generate ideas.

WHY IS ABCD THE RIGHT CHOICE?

This process will create an initiative with impacts that are “BY US — FOR US” — A community-led initiative. The figure below shows the different methods that have been used to create change within a community.⁵²

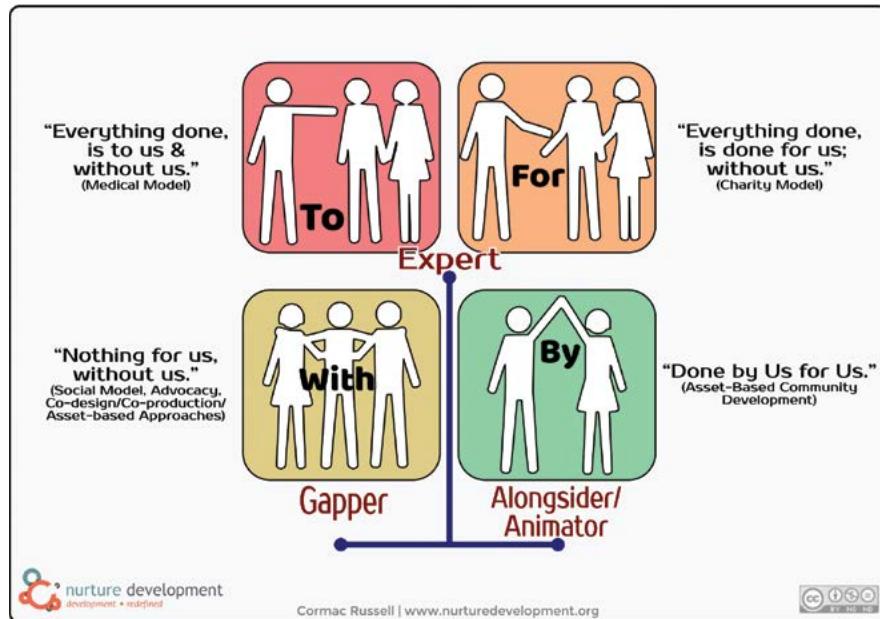


FIGURE 6: Illustrates the four different approaches used to create change — To, For, With and By.

For your Compassionate Community initiative to build lasting impact, those leading it need to ensure that it is done **by** the community **for** the community, which can be achieved by following the ABCD process every step of the way.

I. SUPPORTIVE RESOURCES

A. Articles

[Asset Based Community Development At A Glance⁵¹](#)

An overview of ABCD, an excellent resource to keep close by to help guide the initiative.

[Sustainable Community Development: From What's Wrong To What's Strong](#)

ABCD expert Cormac Russell, speaks to why it's important to focus on what's strong and not what's wrong and how this shift in mindset will empower people to create change locally.



STRATEGIC PLANNING

I. WHAT IS MEANT BY STRATEGIC PLANNING?

Strategic planning is the process of building a common understanding about the Compassionate Community initiative that will organize your actions and objectives to produce community impact. Planning will help get the initiative organized to think about the future by considering the “who, what and when.” The process involves crafting a vision, mission, strategies, objectives, and an action plan to create the big picture for your initiative—also known as a road map for the hopes and dreams for the initiative.

II. WHY STRATEGIC PLANNING IS ESSENTIAL FOR YOUR INITIATIVE

Engaging in a strategic planning process allows the leadership team to understand the communities’ concerns, increase community ownership,⁵³ and create a map highlighting how you will be achieving the change and improving your long-term sustainability.³

Developing a plan allows you to step back and see the bigger picture of what you want to achieve.³ Let’s put it this way; if you were going to start a business, you would need to have a business plan to guide you and to show to potential stakeholders (e.g., funders) that you have thought things through and you are organized. Your strategic plan will do the same, outlining how your Compassionate Community will support the community’s goals now and in the coming years. It will demonstrate your purpose and commitment when you engage with the community,³ funders, and other stakeholders.

III. HOW TO CREATE THE STRATEGIC PLAN FOR YOUR INITIATIVE

A community-led initiative such as a Compassionate Community should co-create the plan with those living in the community to share their knowledge, concerns, and desires for this initiative.

This co-creation process will increase the community’s trust in the leadership team and increase the community’s feeling of ownership.

Strategic planning can happen at any time throughout the development of your initiative—such as when you are starting your initiative, moving into a new phase, applying for funding, and when you are trying to engage people around an old initiative.

The creation of your VMOSA is a best practice approach to strategic planning. VMOSA stands for Vision, Mission, Objectives, Strategies, and Action plan.

HOW TO CREATE THE COMPASSIONATE COMMUNITY INITIATIVE'S VMOSA?

The VMOSA should be created with the community through meetings/working sessions. You want to invite as diverse a group as possible to participate in the sessions and ensure you obtain individual consensus on all the pieces in the plan.

When creating your VMOSA, the Community Tool Box highlights the following descriptions and examples for each piece within the VMOSA.

A. Vision (dream)

Your vision is your dream for the initiative. It is the static, big picture of what you want to achieve. This involves what you believe are the ideals for the community.⁵⁴ Vision statements are short one-liners that convey the hopes for the future of the initiative.⁵⁴

An example of a vision statement is, establishing a successful initiative that serves the community.

Here are some characteristics of a good vision statement:⁵³

- Everyone in the community understands the vision and shares it with other to increase the awareness.
- The statement should be broad to include as many perspectives from the community as possible.
- The statement should leave people feeling inspired and hopeful.
- The statement should be easy to communicate.

B. Mission

Mission statements are the dynamic statements of how you will achieve your stated vision. These statements should be in practical terms that address the “what” and “why” of the organization. Mission statements serve as action statements to help clarify and communicate the initiative’s purpose. They should be concise, outcome oriented, and inclusive.

An example of a mission statement is, to provide support to the local community through initiative projects.

Your initiative’s vision and mission statements will serve as a reminder for your initiative’s values. In addition, developing these statements helps stakeholders involved to take ownership of the initiative.⁴² Creating these statements may be challenging and take several drafts but keeps everyone involved in the initiative on the same page and “pulling in the same direction”.⁵⁴

It helps to keep these statements simple, concise, and easy to remember. For a quick test of effectiveness, ask members of the organization to recall these statements. If they are unable to do so, the statements are ineffective.

C. Objectives

Objectives are very specific, measurable steps you will take to achieve your mission.⁵⁵ An objective takes the general statement of a goal you want to achieve and provides specific milestones and timelines for achieving it.⁵⁵

An approach to think about when creating your objectives is the **SMART** method below:⁵⁵

- **Specific** — Make sure the objectives are specific.
- **Measurable** — Make sure the objectives include something that you can measure to ensure you are achieve the objective.
- **Achievable** — Make sure the objective is something that your initiative can achieve (eventually) with the resources you have.
- **Relevant** — Make sure the objective is relevant to your mission.
- **Timed** — Make sure the objective has an end date included.

An example of an objective is, to increase funding for community projects by 20% before the end of the year.

D. Strategies (the how)

Strategies focus on how you will achieve the objectives you have identified. These strategies need to consider barriers and challenges within the community or audience you are focusing on—for example, seniors might not be technology-friendly, so ensuring your strategies are not technology-based would be an important consideration. Try to ensure you include a variety of strategies so that you can cover as many diverse groups within your community as possible.⁵³

Some strategies include providing information, increasing support, providing resources, and reducing barriers.⁵³

Here are some criteria for your community initiative to include when creating your strategies:⁵³

- **Provide an overall direction** — Point out a direction that includes more of the community and is not specific to one group.
- **Use resources and opportunities** — Make sure the strategy can be achieved with the available resources and assets.

- **Reduce challenges and barriers** — Focus on reducing the challenges and barriers to the members of the community engaging with the activity or program. Consider the example from earlier regarding seniors and technology.
- **Reach those affected** — Ensure the strategy reaches those who it was intended for (e.g., if you want to focus on caregivers, your strategies need to consider where caregivers are typically found).
- **Advance the mission** — Ensure the strategy for the specific objective will also progress your mission and make an impact (e.g., if the mission is to increase support for caregivers and one objective is to increase the number of workplaces that have integrated the Carer-Friendly Workplace Standard by 10% in the next two years, then the strategy could be to increase workplaces' awareness of the Carer-Friendly Workplace Standard).

E. Action plans

An action plan involves statements of specific actions and activities that need to happen to achieve a goal—turning dreams into reality.⁵⁶ It outlines specific plans of how you will achieve your objectives. A clear action plan states the goals and identifies “how” and the steps necessary to successfully reach the goal.⁵⁶ Following our above example of the objective, **to increase funding for community projects by 20% before the end of the year**. The action plan would be for the leadership team to conduct an environmental scan to identify potential funding sources to achieve the goal of 20% for fiscal funding.

Here is some key information each action step should include:⁵⁶

- What actions or changes will occur?
- Who will ensure this happens?
- When will the action start and how long will it take?
- What resources are needed to create the change?
- Who should be informed about this?

Once you have completed the above for each action, you can now create your action plan by pulling all this information together.

Ask these questions when reflecting on the action plan you've created.⁵⁶

- Is it clear who will do what and by when?
- Is the action plan current—Does it capture the current state of the initiative?

These questions can help the leadership team reflect on the action plan yearly and identify if it needs to be updated.

IV. HOW TO USE THE CONTENT FROM THE STRATEGIC PLAN

Your strategic plan will support many aspects of your initiative (e.g., funding proposals) and provide content when completing tools (e.g., social business model canvas and logic model) that are showcasing the big picture of your work.

The first tool we would encourage you to use is the Social Business Model Canvas,⁵⁷ which acts as a business plan (often called “A plan on a page”). This tool will allow you to share an overall snapshot of the initiative—you can use this when you need to make a pitch in 30 seconds or leave it behind after a meeting. Much of the content you created during the VMOSA process will support you when creating this document.

The second tool VMOSA will provide content for is a Logic Model,⁵⁸ commonly used to show the big picture of how the initiative or program is supposed to work. This snapshot of your initiative or specific area within your initiative (e.g., a program) will lay out the objectives and outputs to support your short and long-term goals.⁵⁸ The logic model is a tool funders often encourage, so having one created will increase funding success. Much like the strategic plan and social business model canvas, the logic model will need to be reviewed and adjusted regularly as your initiative and work change.

V. PLANNING FOR SCALE AND SPREAD

When creating your strategic plan, think ahead and consider what scale and spread might look like for your initiative. There are two approaches to scaling your initiative; scaling out and scaling up.⁵⁹

Scaling out is the concept of taking an approach and applying it to new locations and adapt it to the local context.⁵⁹ To achieve this, it takes collaboration and the sharing of current experience. For example, you can take a successful program and share it with other areas within your community. You can also share your knowledge and experience regarding your initiative with others working on their Compassionate Community initiative as a form of scaling out.

Scaling up is the concept of replicating a successful social innovation which involves addressing systems of the root cause.⁵⁹ For Compassionate Communities, this might be working towards scaling up to address regional, provincial, and national policies around palliative care. When you plan and engage in scaling your initiative and experience, it will ultimately lead to the spread of your mission and the movement.

VI. SUPPORTIVE RESOURCES

A. Articles

Overview of Strategic Planning or "VMOSA"⁵³

Learn more about what VMOSA is, when and how to use it in strategic planning. It also provides a checklist, examples and tools on using VMOSA. Keep an eye out for supportive tools on the Community Tool Box webpage.

Vision and Mission Statements⁵⁴

Guiding steps on creating a roadmap for your organization to figure out the vision and mission statement and how to create a strategy, goal, objective, and action plan from the roadmap.

Developing a Logic Model or Theory of Change⁵⁸

Increase your understanding of a logic model, when to use one, how to create one and what makes a logic model effective.

From Social Enterprise to Social Franchise⁵⁹

Lessons learned by a social enterprise to help other social enterprises develop a scalable business model. Encouraging other social enterprises to borrow, replicate and remix the lessons learned in the guide.



B. Tools

[Creating Your VMOSA⁵³](#)

This link provides you with tools such as an agenda for a co-creation session with the community to create your VMOSA with fillable worksheets for each aspect of the VMOSA.

[Social Business Model Canvas Template⁵⁷](#)

A template to create the big picture of the initiative focusing on the operational aspects (e.g., a business plan).

[Creating Logic Models⁶⁰](#)

Increase your understanding of a logic model and the components of a logic model to help you create your own.

[Understanding the Cause⁶¹](#)

Understand the root causes and need for change in your community, this can be used in the initial stage of the initiative when deciding your focus. The leadership teams can use this ahead of a community meeting to determine the purpose of the meeting and the initiative's goals.

[Center for Social Innovation, Impact Dashboard](#)

This dashboard will allow you to track, visualize, and share your impacts with stakeholders as well as help you digitally build your social business model canvas.

MEASURING IMPACT — EVALUATION

I. WHAT IS MEASUREMENT?

Measurement is the planning for and collecting results to show the impact of the initiative. This process is more commonly known as an evaluation and includes several approaches.⁶²

In its simplest form, measurement is the planning for and collection of data to understand the following:

- The resources available in the community.
- The focus of the initiative's work.
- How well the leadership team is working.
- How individual programs are working.

II. WHY FOCUS ON MEASURING YOUR RESULTS AND IMPACT?

Thinking about and planning for measurement is critical for social change movements like a Compassionate Community. Engaging in this work from the start will ensure the initiative stays focused on the desired goals, help collect results, and understand how the work is progressing—leading to increased sustainability.⁶³



III. HOW TO START OR STRENGTHEN MEASUREMENT WITHIN YOUR INITIATIVE

One key thing to always think about when creating your measurement plan is to make sure the effort you are giving to the measurement process is comparable to the size and type of initiative. This will allow you to gather important insight while minimizing the burden on your resources⁶⁴ (such as people and funds).

For instance, in the beginning, the measurements you collect might seem quite simple but remember that at this stage, the initiative is new and most likely has little to no funding support. As your initiative grows, with more programs and funding, the planning and collection of measurements will grow accordingly.

A best practice for the sustainability of social change initiatives is to start measuring as soon as possible.³ If you do not feel like you have the skills needed to plan and execute evaluation activities, there may be an opportunity to partner with someone, or an organization, who can. Can you approach a local university to request support with evaluation? There are several examples of Compassionate Communities that have partnered with an evaluation program at a nearby university.

During this partnership, they received guidance on building a plan and sometimes have students who volunteer on the project to gain experience. Make sure to get connected with the Pan-Canadian Compassionate Community Evaluation Project. This project is designed to support those leading Compassionate Communities in Canada with their evaluation process.

Another best practice regarding the measurement of community initiatives is to ensure the approach is collaborative from start to finish. This means that everyone is involved from the initial planning stage, not just a small team who make the decisions, plan, and rollout the plan (traditional approach).⁶² By including your partners, any funders, and interested community members, you will strengthen relationships, build trust, increase accountability and transparency, and ensure everyone sees the outcomes of the initiative as reasonable and achievable.⁶² The key difference here is that traditionally the plan and measurements are defined without those who are involved in and will benefit from the initiative, while the collaborative approach will include anyone engaged in the initiative. Ultimately, the more you engage the local stakeholders, the better the results and the more sustainable your initiative will be.⁶² However, while this approach will increase your sustainability, it does mean that it will most likely take more time as well.

IV. THE BASICS OF MEASUREMENT

There are four types of measurement and two types of data that your initiative should collect as your work evolves. In this section we will cover this information in more detail, provide a Compassionate Community specific example, and show you what types of measurement to use at each stage.

A. Types of measurement to collect

The measurement plan for a community initiative will include the following four common types of measurement.¹⁹

1. **Needs Assessment/Assets Mapping (also known as formative) —**

This type of measurement is used when the initiative is just starting. It helps you gather information about the strengths and desired goals for the community regarding the specific topic. The results from your needs assessment can help build your case for support with new partners and funders.

TIP — Doing a needs assessment/asset map in the initial stages will provide the initiative with knowledge and understanding about the community and any concerns they would like to address as well as highlight community strengths you can build off of.⁶⁵ By collecting these results, you can use them to shape your vision, mission, move ideas into an action plan, and increase the awareness of this initiative at the same time.⁶⁵

For example — Let's say you host a community meeting with a focus group activity. The questions asked during the focus group should include the following:

1. Do you know where to find resources that would support someone who is caregiving, dying, or grieving?
2. Within the last 2 years, have you supported a community member who was caregiving, dying, or grieving?

Asking questions such as this will help the leadership teams know the current state of the community's understanding of caregiving, dying, and grief. In addition, performing a needs assessment allows the community to decide what they want to focus on, where to start, and what they want the goals to be. You can also create a survey from the same questions that you circulate within the community.

2. **Process (also known as implementation)** — This type of measurement is used when the initiative is in its early stages, or you are rolling out a new program and want to see how things are going. During a process measurement, you will also collect data about the daily activities within and outside the group to determine how well things are going. Measurement tools could include surveys before and after a program is run or after a community meeting. The data collected can consist of how many people participated, would they participate again, and questions allowing people to give feedback or express how this program has had an impact on them. The collection of this data will help you understand how the initiative is doing and how the new programming is working, allowing you to make changes early on, if necessary.

For example — Let's say your program has a focus on increasing the awareness of community resources. You could ask the participants—did your awareness of where to find resources to support those caregiving, dying, and grieving increase after participating in this program? These types of questions build on the needs assessment example questions.

3. **Outcomes** — This measurement happens when your initiative has several programs running and there have been a few years of engagement with the community. Here you will understand your initiative's short and medium-term effect on those who are engaging with your work. The results will allow you to make decisions about whether the initiative is making the desired impact or if you might need to adjust. You can design the questions in your outcome measurement plan to build off questions you asked during your needs assessment. Additionally, measuring your outcomes will support the measurement of the long-term goals.

For example — Let's say, one of your initiative's goals is to increase community members' comfort in supporting someone who is caregiving, dying or grieving. To measure this outcome you could survey those who have participated in your programs over the last several years. You could ask the following questions to understand if community members are more comfortable after using your resources.

1. After participating in our Compassionate Community programs, are you more comfortable supporting someone who is caregiving, dying, or grieving?
2. Has your awareness of where to find resources increased after participating in our Compassionate Community programs?

4. **Impact (also known as summative)** — This refers to the measurement of the long-term outcomes or impacts of the initiative. This measurement takes place much later in the initiative's lifespan. This is about measuring the goal of the initiative. These long-term outcomes measurements can include increased capacity and culture change.

For example — Throughout the examples given above, we have stated that one of the initiative's long-term goals is to increase the number of community members offering support to someone in the community who is caregiving, dying or grieving. You could circulate a survey within the community and ask the following questions:

1. Have you supported someone in the community who is caregiving, dying or grieving within the last 2 years?
 2. Do you know where to find resources that would support someone who is caregiving, dying or grieving?

By asking similar questions to the needs assessment, you will be able to see if more community members are aware of where to find supportive resources and if there is an increase in community members supporting those affected. This can show the impact that your initiative has made over the years.

In the following figure, you can see how the types of measurement align with **Canadian Compassionate Communities' Stages of Development**. Please use this to help you understand what types of measurement your plan will focus on as you move through the stages.

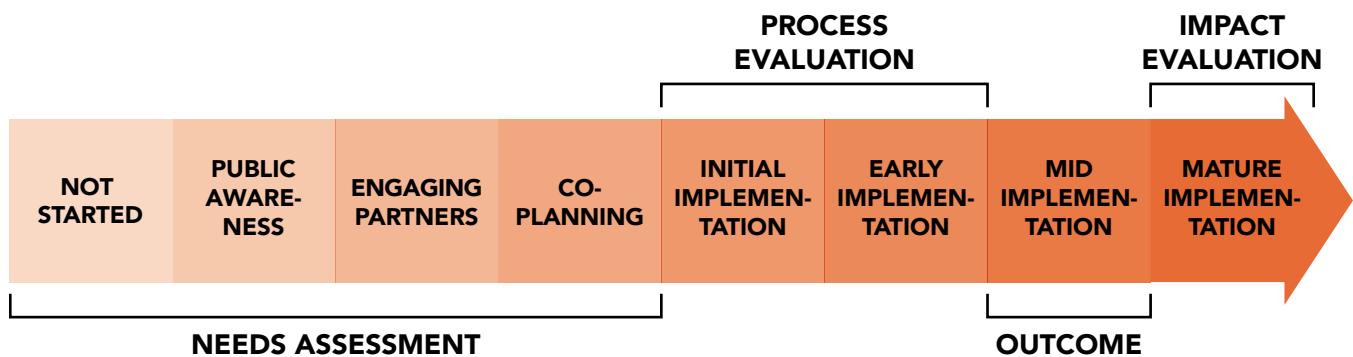


FIGURE 7: An adapted visual of the Canadian Compassionate Communities' Stages of Development and the types of measurements to collect at each stage

B. Types of data to collect

In addition to the types of measurement, there are two complementary kinds of data a community-driven initiative should collect: thick and thin data.⁶⁶ Thick data is formally known as qualitative data such as stories that give more context or feeling to an initiative's impact.⁶⁶ Thin data is formally known as quantitative data, numbers which show measurable change, such as the changing number of people engaging with the initiative.⁶⁶ When you plan to capture both types of data in your measurement plan—this is referred to as Mixed Methods (MM). You can collect both forms of data any time you are collecting data.⁶⁷ Keep in mind the approach of including thick and thin data is a newer concept, therefore you may encounter people who are not aware of this best practice yet. In the early stages of your initiative, collecting thick data will give more emotion to the work when speaking to potential stakeholders, partners, and funders.

When planning for measurement, take the time to really think about how you are going to use the data you collect. This is important for a few reasons—first, so you are not putting in more effort collecting than you will use; second, so you are not taking up more time than is needed from the participants who are giving you the data; and third, so you are not managing the safe storage of data that is not being used. Think about the questions you want to include in your plan and ask, “how will we use the data we collect from this question?” If you don’t have a clear answer, it might not be worth including in your plan.

C. Measuring other aspects of your initiative

There are other areas where measurement is essential, like how your partnerships are working, or the leadership team is functioning. Evaluating the initiative's internal workings will allow you to learn how things are going and assess where there is room to grow—leading to a stronger and more sustainable initiative.

D. How to plan for the measurement of your initiative

Planning how and what you will measure may seem like an overwhelming task, but don't worry. We are going to cover some key tools to help you and the links to the tools will be in the resources section below.

- **Logic Model** — This tool is often used when planning for measurement. We mentioned the logic model earlier in the program planning section as a tool that can be adapted and used in many areas within your initiative.⁵⁸ Using a logic model as a part of your measurement planning will help you with the following: documenting your accomplishments, showcasing the evidence that supports the program or activity, determining what will be measured, and telling the story of your activity, program, or the initiative and more.⁵⁸ It is important to adjust the logic model as the initiative evolves to ensure that you measure what is needed to see if you are achieving the desired goals.

- **Social Business Model Canvas⁵⁷** — This is a more basic tool than the logic model and will help you to plan for measurement, support the measurement phases, and show achievements so far. By using this tool, you will create the indicators that you need to measure. This tool will also help you understand your achievements and communicate them.
- **Compassionate Communities Evaluation Website** — This website is the outcome of the Pan-Canadian Compassionate Communities Evaluation Project mentioned earlier. The website will act as a road map by asking you questions that will influence and create your unique measurement plan, which you can take with you once completed. You will be able to come back to this website in future as your initiative evolves and your measure plan needs to adjust. This resource will be live in late 2021.

E. How to use the data collected

You may have already picked up on some of the way to use the data you collect from your measurement plan. However, let's summarize the ways to use the data below:

- Use the data when designing the goals and outcomes for your initiative.
- Use the data in your case for support (example in the canvas tool) when looking for funding, new partnerships and more.
- Use the data when applying for funding, showing the need and the impact your initiative has had so far.
- Include the data in your funding reports.
- Use the outcome data to understand how the initiative is doing regarding achieving the goals which will help you continually drive your initiative forward.

The key here is to start collecting right away, so you are prepared to state your case or when a funding application asks for supporting data.

V. SUPPORTIVE RESOURCES

A. Articles

[Strengthening Evaluation literacy | Demystifying Participatory And Collaborative Approaches To Evaluation⁶²](#)

Learn more about the basics of evaluation, the difference between traditional approaches to evaluation (measurement) and the desired approaches to use when engaging in the measurement of a community-led initiative.

B. Supporting Documents

[Pan Canadian Compassionate Communities Evaluation Framework](#)

Explore this resource created specifically for Compassionate Communities within Canada to support their measurement planning and rollout. The resource will be an interactive website currently under development—expected to be live in the Fall of 2021. We encourage you to visit this link to learn more about the initiative and sign up to stay informed.



C. Tools

Death Literacy Index⁶⁸

Use this 29-question survey to measure people's knowledge in 4 areas — practical, experiential, fact-based, and community; it can be used in a group or across the community. The results can guide the areas you will focus on within the initiative. You can distribute the survey again in the future to see if there have been any improvements in death literacy.

The Compassionate Community Index⁴⁶

Use this survey in the early stages during community meetings to assess that community's readiness and commitment to become a more Compassionate Community. This tool can also be used during the needs assessment/assets mapping phase in your measurement plan.

Asset-Based Community Development At A Glance⁵¹

Learn more about ABCD, review the section on how to evaluate Asset-Based Community Development.

Evaluation Guide: Fundamentals of Evaluating Partnerships⁶⁹

Learn more what a good partnership looks like, the stages partnerships go through, and how to evaluate them throughout the initiative's life.

Tools to Evaluate Your Coalition⁷⁰

A guide to how to develop coalitions, what to do when coalitions have been established, and how to evaluate a mature coalition.

Assessing Readiness for Community-Engaged Evaluation⁷¹

Learn more about assess existing capacity and levels of readiness to prepare for doing community-engaged evaluation work. Encourages a mixed-methods process that applies across different contexts and communities.

Centre for Social Innovation — Impact Dashboard

This dashboard will allow you to track, visualize, and share your impacts with stakeholders. This tool can help create your logic model.

PARTNERSHIPS — BUILDING, NURTURING, AND MAINTAINING RELATIONSHIPS

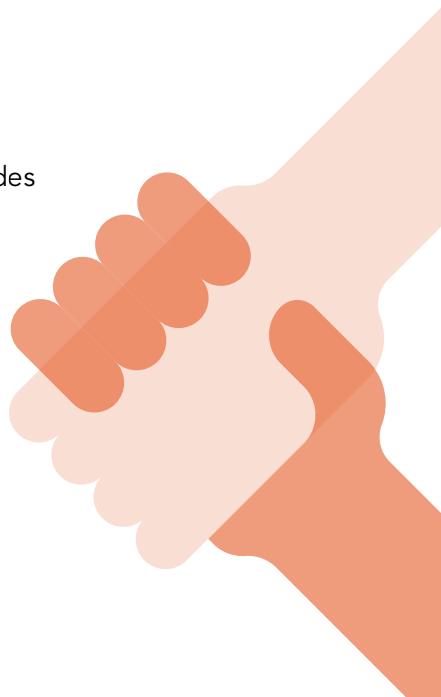
I. WHAT IS MEANT BY PARTNERSHIPS?

Partnerships and collaborations involve two or more partners (i.e., individuals, organizations, networks) from various sectors or groups working towards a common objective.⁷² Partnerships are about building, nurturing, and maintaining mutually beneficial relationships to achieve shared goals.⁷² Potential partners include local businesses, community organizations, funders, and others interested in supporting your Compassionate Community initiative.

II. WHY FOCUS ON PARTNERSHIPS?

Partnerships allow you to have a more significant impact by creating connections and space for shared responsibility. A philosophy by social innovators to guide you is, "Act like an organization, but think like a movement."⁷² This mindset encourages you to seek diverse relationships across organizations, institutions, and sectors to increase the success of your efforts.⁷² The Collective Impact (CI) framework involves key factors for successful community efforts to shift from "fragmented actions and results" to "collective action and deep and durable impact."⁷² Creating connections builds capacity for collective impact and provides larger networks to advocate for your initiative's cause.⁵ Strategic partnerships expand your resources (e.g., ideas, efforts, funds, etc.) and provide different perspectives and solutions to enhance the development of your work.

It is important to acknowledge that social innovations involve much interconnectedness and complexity. Therefore, involving partners across all levels (individual, relationship, community, and society) can be highly beneficial to address complex and often interrelated concerns. Partners can offer expertise, experience, resources, and support necessary when co-creating to achieve a collective impact. Forming partnerships will allow you to share workloads, be more effective and efficient with resources for long-term impact rather than when you work alone.^{73,74} In some cases, having partners shows the initiative is collaborative, which funders like to see. Having a variety of partnerships will advance your initiative as it can extend your resources and help address areas of development outside your organization's capacity.



III. HOW TO BUILD AND MANAGE PARTNERSHIPS?

Partnerships can happen at any stage of development, and they can evolve. For instance, engaging a diverse group of partners at the start of your initiative is beneficial as it increases the involvement and commitment to the shared goal.

Here are some effective steps to help be deliberate in building strategic relationships as identified in the Top 100 Partners Exercise outlined by Tamarack Institute:³⁸

1. **Brainstorm a list of partners** — Think of all the people in your community who may have interest in your initiative; include existing partners and categorized this list under business, voluntary, government, and people who are affected. List as many people as you can!

For example — Consider people within the community who have been affected by death, loss, and caregiving, the local hospice, the funeral home and so on.

2. **Rank your list by sector** — Break down your list according to those your initiative is most familiar with and organize it by sector.
3. **Rank your list by people** — Identify your top three individuals or organizations in each list and think about your closeness and existing relationship with each person or organization during your process.
4. **Consider who you will approach first** — Rank your list of partner options to those you'd like to approach first, which includes the people you know well and would most likely be willing to participate in your initiative. This sets you up for the very last step, crafting your "ask".

At this point, it is useful to ask yourself the following:⁷⁵

- What interest the stakeholder has for your initiative/project: how is this movement of value to them?
 - What knowledge and insight could the stakeholder bring to the initiative/project?
 - What method of engagement will you use to approach the stakeholder?
 - What resources might the stakeholder bring to your initiative/project?
5. **Craft the "ask"** — Think about how you will approach potential partners. How will you introduce your idea and convey the value of your initiative? Remember that adjusting your language here will be important.

These five steps provide you with a jump start to form relationships. If you would like to learn more approaches about formulating potential partnership lists and tools to help, see the community engagement section on [page 31](#). In your desire to create change, it is best to engage people who are involved in the system in which you seek to create change.³⁸ This can include people of existing leadership positions (e.g., Mayors) who have existing influence. This exercise prompts you to think about who to approach, why, and consider quick partnerships that may give your initiative more credibility to raise awareness from the start.³⁸

Once you have completed your list, it would be wise to create a database to refer to. As your initiative begins to engage with the community and other stakeholders, make sure you keep a list of attendees of your events. Every interaction you have regarding your Compassionate Community is an opportunity to build a relationship.³⁸ During engagements, collect addresses, emails, business cards, and anything that will allow you to update and inform individuals of the work that you are doing. After some time, you will have created a database of people across many sectors who have shown interest in the initiative. Keeping a database of this information allows to you to manage your relationships in a deliberate manner and keep an open door for potential partnerships in the future.³⁸

A. How to formalize a partnership

Once you settled on common goals and shared values, the best practice for entering a partnership is an agreement or a memorandum of understanding (MOU). These documents are often used by partners when collaborating. The level of formality required by the collaborative partners will determine if an agreement or MOU is needed. An agreement is commonly used in a simple collaboration. This document outlines the agreed outcomes, goals, objectives, values, roles and responsibilities, commitments (e.g., resources, meeting space, etc.) of each party. It also outlines how intended outcomes will be measured, how decisions will be made, some terms of resolving conflict, and lastly a termination of collaboration. All these aspects of the document require mutual agreement by all parties involved. A memorandum of understanding (MOU) consists of a bit more detail than an agreement and is used for more significant projects (e.g., when money is involved). We have attached below some tools and templates of an agreement and an MOU.

B. How to strengthen your partnerships

The process of strengthening your partnerships requires consistent effort to build, nurture, and maintain the relationship. To engage with different groups, you need to establish common connections, interests, relevance and/or trust. It is important to learn about and understand the potential partner to build a relationship before engaging. By doing this groundwork, you can identify potential areas for collaboration and adjust how you speak with them about this initiative. Please see the language section on [page 25](#) for more information about the importance of effective communication.

Research shows that there are five conditions involved in the success of social innovations producing collective impact. The following conditions identified in the article *Collective Impact 3.0* by Tamarack Institute help to provide alignment in partnerships and collaboration that lead to desired outcomes:⁷³

1. **Common Agenda** — This requires that all parties involved have a shared vision for change, a shared understanding of the issue and a joint approach with agreed strategies/actions to address it.
2. **Shared Measurement** — This requires an agreement on collecting data and measuring results to ensure that efforts enable intended outcomes. Shared measurement helps keep partners accountable and learn from successes/failures.
3. **Mutually-Reinforcing Activities** — This requires that each party collectively participates using their strengths/resources and co-ordinates with complimentary activities to support the mutual goal of the partnership.
4. **Continuous Communication** — This requires developing trust and ensuring that both parties' interests are treated fairly with objective evidence-based decisions through consistent communications (e.g., regular meetings held monthly).
5. ***Backbone Support and Funding** — Requires a dedicated point person to manage, facilitate and co-ordinate the collective impact of the partnership. Financial support for the infrastructure of the collaboration (i.e., funding to support development, measurement systems, and human resources) can also sometimes be needed to advance the work.
* Although helpful for some projects, backbone support and funding may not be necessary for all partnerships.

Ensuring that you have these five conditions in place is a best practice for achieving strong collective impact in your partner collaborations.

Building, nurturing, and maintaining relationships with partners is an ongoing process and requires patience. Partnerships can require people across all levels to interact and engage with each other.

Here are five key operating principles identified by the Partnership Brokerage Association to consider for effective partnerships:⁷⁶

1. **Diversity** — The commitment to explore each other's missions, values, and interest to build an understanding that comes from diversity of different perspectives.
2. **Equity** — Ensuring there is a balance of power by respecting and acknowledging each party's views and contributions.
3. **Openness** — Trust is not pre-existing and needs to be built through transparent communication while minimizing perceived risks by all parties. See the trust section on [page 75](#) for more information.
4. **Mutual Benefit** — Understanding that all parties should gain from the partnership and agreed-upon shared goals.
5. **Courage** — All relationships carry a level of uncertainty, and it sometimes requires being bold and brave to address issues to achieve results.

Taking these factors into consideration will ensure you are maintaining and nurturing relationships throughout your collaborative process.

It can take time for your initiative to get buy-in from the correct stakeholders and for the leadership team to build the skills to create opportunities and navigate challenges when working with others.³⁸

Keeping these operating principles in mind during your partnership interactions will help you navigate your collaborative process.

IV. WHAT TO DO WHEN PARTNERSHIPS DO NOT GO AS EXPECTED

Although beneficial, it is important to acknowledge that navigating the complexity of working with others can present challenges and conflicts.⁷² You may come across partnerships and collaborations that involve conflict, do not work out how it was intended, or it simply was not the right time.⁷² In this section we cover how you can manage and resolve conflict, as well as leaving a partnership.

A. Managing conflict

When working with those different from us, conflict and misunderstandings may arise, it is best to ensure that such situations are well managed so the partnership remains in good standing.⁷² In which case, the root cause of the conflict must be addressed. Taking the time to confront the issues will help build trust and understanding amongst partners. Check out the United Way Toolkit Toronto linked below for a tool to have an open and honest discussion with partners around conflict (Tool 10) as well as how to effectively deal with conflict before it escalates (Tool 11).⁷²

V. TERMINATING OR LEAVING A PARTNERSHIP

Though your intention when forming a partnership is to succeed, you may come across situations where you and/or your partner are no longer able to or do not wish to continue the partnership. Our community experts expressed that sometimes it is simply okay to walk away when something does not work. This is important to limit damages in hopes of having a future relationship.

Here are some steps from the United Way Toolkit Toronto (Tool 12) for leaving and/or terminating a collaboration to ensure you are leaving a partnership in good standing:⁷²

1. **Confirm your initiative wants to leave** — Discuss the reasons you want to leave with your team.
 - Is the collaboration not a good match with your organization?
 - Is it about the effectiveness of the collaboration? If yes, are there steps you can take to strengthen the partnership? Are these steps feasible for your resources (i.e., time, energy, money)? What is the likelihood of success? Is it worth the investment?
 - Identify the risks of leaving, consider if the risks are worth taking, if so, how can you address them?

Consider:

- The damage to your brand/reputation.
- Implications for future relationships.

- Impacts on the collaboration outcomes and impacts.
 - Loss of influence/credibility.
 - Impacts on investment of time and resources to date.
2. **Plan to leave** — Set out a clear plan and write a rationale for leaving the collaboration and a plan to share it with your team.
- Your rational and plan should include:
- The reasons for leaving and how they will present to partners.
 - The assessment of risks of leaving and the strategies for addressing them.
 - If appropriate, how to maintain some benefits of the participation (i.e., information, influence).
 - Who needs to be informed, when and by whom.
3. **Review procedures** — If you have an exit strategy as part of your collaboration agreement, review it and consider the steps required and implications for your exit strategy.
4. **Communicate with the partners(s)** — Be honest and transparent.
- Develop the key messages to be communicated which include:
- Clearly, simply, and honestly laying out the reasons for leaving so they can't be misinterpreted.
 - Suggest how your organization might be able to continue involvement and support.
 - Determine who should communicate the messages, to whom, and how best to do it.
5. **Follow-up** — Ensure that the message has been received accurately by the right people and if appropriate, carry out agreed-upon follow-up actions effectively.

Remember, leaving or terminating a partnership does not have to be a negative experience. You can also leave or terminate a partnership once the intended goals are accomplished, or due to lack of funding or withdrawal of other partners.³⁷ In the case of accomplished goals, partnerships should be recognized and celebrated for their accomplishments. It is important that partnerships not simply drift away, linger, or have no definitive conclusion. The United Way Toolkit Toronto provides a tool for bringing closure to a collaboration (Tool 13).⁷²

VI. SUPPORTIVE RESOURCES

A. Articles

Collective Impact 3.0 | An Evolving Framework for Community Change⁷³

Learn more about best practices for collective impact and discusses in detail the five conditions that are necessary for achieving collective impact.

Supporting Partnerships: 6 Key Activities⁷⁷

Review this for more information on the keys to successful partnerships.

Brokering Better Partnerships⁷⁶

A guide to understanding what it is to build successful partnerships by detailing the partnering cycle and providing evaluation examples. Focuses on sustainability, inclusivity, and collaborative models.

Time to do Stakeholder Mapping Differently⁷⁵

Learn more about asking the right questions to understand how you can work constructively with stakeholders. The matrix provided will inform you of the effort and approach necessary for different stakeholders.



B. Tools

Top 100 Partners Exercise³⁸

Use this to help you think about partnerships across all levels, identify and prioritize influential stakeholders to engage with and build a database for your interactions with stakeholders.

The Collaboration Spectrum⁷⁸

Use this to demonstrate where you stand in the collaborative spectrum for stakeholders. This will help you assess how collaborative you are being to help you build trust with stakeholders and community.

Self-Evaluation Tool for Action in Partnership⁷⁹

Learn more to understand the various aspects of partnerships, through self-evaluation.

Practicing Effectively As A Collaborative Partner — United Way Toronto Toolkit⁷²

Learn more about engaging effective community partners as a non-profit organization. This toolkit provides tools for framing collaboration, building effective collaborations, leaving or terminating a collaboration and address current challenges and opportunities.

Agreement and Memorandum of Understanding Templates

Templates for an agreement and memorandum of understanding for collaborating with stakeholders.

Center for Social Innovation, Impact Dashboard

This dashboard will allow you to share your impacts with partners by generating custom reports.

FUNDING

I. WHAT IS MEANT BY FUNDING?

Funding refers to the financial resources that will support and fuel the work of your initiative. When planning for the future of your initiative, securing funding should be at the top of your list. We will be focusing on the two types of funding—organizational and program.

II. WHY FOCUS ON FUNDING?

Obtaining funding ensures you have the resources to facilitate the work⁸⁰ of your Compassionate Community. There are three critical elements in your initiative's early stage: developing the idea, creating a team, and securing money. Once the decision to start a Compassionate Community is made and a leadership team is in place, the next step is raising money to support the initiative. In these early stages, there is a lot of momentum and excitement about the potential for change, making it the easiest time to secure funding.⁸¹

As a social change initiative that does not generate revenue, it is fundamental to seek out funding opportunities. The funding often comes through donors, foundations, member contributions, fundraising, public sources, and so on.

Seeking funding will increase the awareness of your mission and facilitates your work as an organization. Additionally, diversifying your funding streams increases financial security and decreases dependency on any individual source. This approach will ensure programs can continue. For example, if a funding stream is no longer available, the impact on your programs should be minimal.

III. HOW TO STRENGTHEN YOUR FUNDING APPLICATIONS

This section will talk about organizational and project funding and provide tips to strengthen your funding applications. As you know, obtaining funding takes time and commitment, so initiatives often have a person(s) designated to this specific area.

A. Organizational funding

In the initial stage, the Compassionate Community can benefit from financial support to help advance the work needed to raise awareness and promote their mission. This type of funding is known as organizational or backbone funding.

Securing backbone funding can be challenging. Specifically when conveying to potential funders understand how your initiative works internally, for example, what it takes to run the initiative and program(s).⁶⁶ To increase funding success, highlight the best practices you have in place that increase your sustainability (use the resources in this guide to support this piece) and outline the impacts of your initiative.⁸² It can be helpful to describe the effect of having backbone funding in place versus working without it. When engaging with funders, be clear of the pieces required, for example, human resources necessary to support the work behind the scenes.⁸² Compassionate Ottawa's use of funding to hire a part-time staff is an excellent example of backbone funding. Engaging with a variety of funders can support many backbone areas of your organization, such as data collection, community outreach, advocacy and so on.

B. Program funding

In later stages of your initiative, funding can help start or sustain ongoing programs and focus on increasing awareness on a broader scale. Funding for programs can include printing documents, organizing events, finding locations and so on. Once you have a program in mind or have successfully completed the piloting of a program, it is wise to be alert to sustainable funding streams such as government or foundation funding, which are renewable for annual programs.⁶³ At this point, stay connected to supportive Compassionate Community organizations at the provincial and national level, such as Pallium Canada, to stay informed on current developments and funding opportunities.

As your initiative grows, there will be many ongoing developments with the organization and programs. So, balance out the funding you seek to address the needs and support both areas of your work so you can keep the momentum going.

IV. TIPS FOR FUNDING — ORGANIZATIONAL AND PROGRAM

When applying or engaging with a funder, be sure to research them ahead of time. This step will allow you to understand their mission, priorities, and data type used to show impact. Use this knowledge to modify the information you share with them and adjust your language, as necessary. Adapting the information and language used with each funder will increase the likelihood they understand your request and increase the likelihood of them offering you funding.

To clarify, do not give the exact same information to different funders. Using your reports and measurement data can show the impact of your work. This approach will speak more to funders who are less familiar with social initiatives.

Throughout the journey, you will experience many types of funding sources and each funder will have specific criteria for their application. It's important to adapt your grant submissions to the prospective partners by referring to their guidelines. The process of getting a grant can be competitive; tailoring your proposal can increase your chances of being considered and approved for funding. Investing the time to adapt your application is an essential step to making your submission stand out.⁸²

Some key elements of a successful proposal include being clear, concise, and logical when defining needs, intention for funds, detailed budgets, and benefactors of the program.⁸² In addition to an application, a personalized letter of support can be submitted by your leadership team to express in detail how the grant will be efficiently used to support your organization.⁸⁴ If you would like to learn more tips for a winning proposal and find a letter of support template, check the supportive resources below.

Through organizational and program funding, you can support the future of your initiative's organizational and program development. As your initiative grows, a future goal may be to transition into the not-for-profit sector and access more funding opportunities. However, becoming a not-for-profit organization requires a lot of effort which is when having an established leadership team dedicated to the initiative is vital.

V. SUPPORTIVE RESOURCES

A. Articles

Three Key Components of Effective Donor Communication⁸⁴

Learn indepth techniques for donor communication by looking at the donor's perspective.

Securing Funding for the Backbone Role: Lessons from the Field⁸²

Learn more about how to support and sustain your backbone/organizational funding and some indepth tips for backbone funding applications.

Getting the Grant⁸³

Learn more indepth tips and information to writing a successful grant proposal.

B. Tools

10 Elements of a Winning Proposal

This tool outlines some tips and elements of a successful proposal.

Letter of Support Template

A sample of a support letter to send to an institution or organization following a funding application.

Agreement Templates (Formal and Informal)

A sample of a formal and informal agreement for stakeholders collaboration.



BUILDING TRUST

I. WHAT IS MEANT BY BUILDING TRUST?

Building trust is the process of establishing transparency, showing respect, and nurturing relationships with your stakeholders. Building trust is a fundamental concept that enhances your collaborative efforts and increases your initiative's collective impact for the greater good of the community.

II. WHY FOCUS ON BUILDING TRUST?

The Compassionate Community movement focuses on creating change within the community and therefore requires community members, partners, supporters, and those leading the initiative to work collaboratively, all of which require trust between everyone engaged. These relationships will evolve, and so too will their roles within the movement. For example, at the start of a Compassionate Community initiative, those who have taken a leadership position to get it started have more control over what is said and to whom. In contrast, the community members are in a more passive role. But as the initiative grows along with the activities and programs, all the roles will adjust, with the leadership team stepping back into a more supportive role. Partners and engaged community members become the face of the initiative in the community. As you can see from this example, there needs to be a great deal of trust between everyone actively supporting the Compassionate Community's initiative. Research has noted that to have this level of collaboration, you must practice building trust for the duration of the collaboration.⁸⁵

To achieve success and intended outcomes of your initiative, trust must be a mindful practice in all your interactions and collaborative efforts. Building trust is achieved through working, listening, and understanding during collaborations.⁵ Trust requires a mutual relationship where you must risk being vulnerable while assessing others' likelihood of supporting you. For example, suppose you are in the early stages of your Compassionate Community, building trust starts by having open and honest conversations regarding the direction of your initiative with your community. As your initiative grows, you will form new partnerships, and trust will be the foundation for the development of your collaborative process. Part of engaging with others will consist of recognizing the differences and complexities that come with co-creation. This is when established trust helps you rely on others even in uncertain times.⁵ Establishing transparency within your organization as well as with your external stakeholders is central to supporting your Compassionate Community. Being open and clear is important to form trusting relationships that encourage participation, collaboration and a co-creative environment that advances your initiative's mission. This reinforces the statement, "authentic community change moves at the speed of trust."⁸⁴

III. HOW TO INCREASE TRUST WITHIN YOUR ORGANIZATION AND WITH STAKEHOLDERS

This section will cover factors to be considered and strategies to help build trust in collaborative relationships. To build trust, you need to embrace the reality of your community and be transparent in your actions and communications.⁸⁵

As previously mentioned, trust involves risking being vulnerable while assessing the other party's willingness to support you. Here are four factors identified in the article *Turf, Trust, Co-creation and Collective Impact* by Tamarack Institute that both parties need to consider before risking vulnerability:⁸⁵

- **Sincerity** — Is this person honest? Is the information being conveyed valid, useful or supported by experience or evidence?
- **Reliability** — Is this person committed? Will they keep their word or promise?
- **Competence** — Does this person have the ability (i.e., capacity, expertise, experience, knowledge, and other resources) to perform the task?
- **Care** — Is this person keeping the other person's interest in mind for actions and decisions proposed?

Care is the most important factor for building lasting trust, when you believe that someone has your interest in mind, you will be more likely to extend your trust.⁸⁴ Keeping these four trust factors in mind are crucial when collaborating with your community and external partners.

IV. WAVES OF TRUST

There are five identified waves of trust identified in *Turf, Trust, Co-creation and Collective Impact* by Tamarack Institute; self-trust, relationship trust, organizational trust, societal trust and market trust.⁸⁵ In this guide, we will focus on four of these five waves that you will come across for your Compassionate Community, these include relationship trust, organizational trust, societal trust and market trust.

A. Relationship trust

Relationship trust is when we build trust with others over time, and it involves intentional investment in the relationship, including your team and other stakeholders. Here are 13 behaviours for building trust in relationships, as identified by Stephen Covey in his book *The Speed of Trust*:⁸⁵

1. Talk straight
2. Demonstrate respect
3. Create transparency
4. Right wrongs
5. Show loyalty
6. Deliver results
7. Get better
8. Confront reality
9. Clarify expectations
10. Practice accountability
11. Listen first
12. Keep commitments
13. Extend trust

B. Organizational trust

As an organization, it is important that you ensure stakeholders see your initiative and leadership team as trustworthy. Organizational trust can be achieved by ensuring an intentional alignment of your vision, mission, and actions as an organization. The following factors and questions identified in *Turf, Trust, Co-creation and Collective Impact* by Tamarack Institute are important points for building team relationships and collaborative partnerships:⁸⁵

1. **Intent** — Do we agree on what we are trying to make happen?
2. **Interest** — Do we share the same basic interest?
3. **Values** — Do we share the same values? Where do our values appear to be in conflict, can we see how they are complementary and both necessary to success?
4. **Analysis** — Do our various analyses of what's going on with this issue complement one another, or compete in fundamental ways? Are my views and experiences meaningfully reflected in that analysis?
5. **Need** — Why should we work together? What will that accomplish that I can't accomplish alone?
6. **Empathy** — Do we really understand the needs and experiences of those we're trying to help?

7. **Belonging** — Can I trust you? Will you look out for me and my needs and interests in this work together?
8. **Contribution** — Can I contribute meaningfully to this work?
9. **Plans** — How will we do this? Are the plans enough to make this happen? Will we use my and others' time effectively?
10. **Commitment** — Are we truly committed to making this happen?
11. **Momentum** — Does what we are doing seem to be working? Are we attracting the people and resources we need to be successful?

Trust is fundamental in your inward and outward work as an organization. Within your Compassionate Community, trust is built with actions and activities necessary to build, nurture, and maintain your initiative (e.g., when crafting your vision for the community). Encouraging co-creation with every action increases connection and community ownership for your Compassionate Community.⁸² Your outward work involves your action to achieve your goals, this depends on the trust developed inwardly through your leadership team.⁸⁵

C. Societal trust

Societal trust involves creating value for your community and making contributions to society through your work. For example, the lives of individuals in the community that you impact and support through the work of your Compassionate Community and how this value is contributing to society.

Part of creating value for your community will involve including those affected or interested in the movement to be part of the co-creation process. Here are some strategies to build trust when working for community change as identified in Turf, Trust, Co-creation and Collective Impact by Tamarack Institute:⁸⁵

- **Shift the Context** — Bring people to a location that is different from their current environment.
- **Understand the system** — People need to have a complete understanding of the system they want to impact/shift.
- **Tell Your Story** — Share the why behind why people are there, their actions, experiences, their mental models and/or views of the world.
- **Diversity and Dialogue** — Build diversity into the design.

D. Market trust

Lastly, when you focus on relationship, organizational, and societal trust, it will strengthen your market trust which is your reputation in the community. Ensuring that you have high market trust will increase your ability to access funding and partners.

Research suggests that “the more informed the community is, the more likely they are to trust.” No matter how simple or complex, sharing information allows stakeholders to be part of the solution rather than excluding them from it.⁸⁶ Being honest when working with others builds trust and encourages positive interactions to achieve shared outcomes. Transparency is critical since withholding information can hinder the development of your relationships with stakeholders and impede your initiative’s progress.⁸⁷

Working towards achieving trust requires intentionality in your relationships,⁸⁵ organization, society, and the market to advance your work and increase your collective impact. Understanding, practicing, and building trust in relationships, organizations, and systems is a best practice for community development and increases your initiative’s sustainability.¹⁹

Collaborative partners who try to ensure safe spaces for exchange that account for the feelings of risks and build a foundation of trust are more likely to succeed as a collective.⁵ Therefore, it is essential to spend time building trust with your stakeholders to increase your chances of success.

V. HOW TO REBUILD BROKEN TRUST

In the case of broken trust, we need to identify specific actions and steps to resolve the relationship.⁸⁵ This can be challenging, however, necessary for collaborative efforts. It is important to understand mistakes made and take responsibility even if you were not directly responsible. Re-building trust is necessary to advance your work with the community and/or partners. This can take a lot of work and requires that you understand the history, networks, and structures in place to get an idea of previous engagement efforts. Understanding the other party's perspectives will help you identify strategies to engage and re-build the relationship to regain trust.⁸⁵

To move from reflection to actions, here's a list of strategies from the article *Turf, Trust, Co-creation and Collective Impact* by Tamarack Institute of what to do in the case of broken trust:⁸⁵

1. **Decide if you are willing** to communicate the distrust. Ask yourself:
 - What might I lose by having this conversation?
 - What will I lose by continuing to distrust this person?
 - How will it benefit, me, my team and organization to work this out so I can trust this person?
2. **Identify your area(s) of concern:** sincerity, reliability, competence, or care.
3. **Define the standard you are using:** the point of this step is to realize that the other person may well have different standards than you. If this is the case, then you can focus your conversation to arrive at a shared understanding.
4. **Identify specific action or behaviours** that have led your assessment of distrust: This step is critical. Telling the person specifically what they do and/or say, or rather, what they don't do and/or say that you interpret as untrustworthy to help them understand how to rebuild trust with you.
5. **Determine what you need from them** in order to regain your trust: What can they do that will address your concerns and reassure you that you can begin or resume trusting them? Think it through from the other person's perspective. Is this something they have the capacity to do? Can they do it in the context of their work environment? How can you help them regain your trust?
6. **Ask the other person** if they would be willing to have a conversation with you about something that concerns you. Agree on a time and place that are mutually convenient and private. You want the other person to be thoughtful and open to listening to your concern and not defensive. Avoid blindsiding them by bringing this up as part of a conversation about something else.

VI. SUPPORTIVE RESOURCES

A. Articles

Turf, Trust, Co-creation and Collective Impact⁸⁵

Learn more about trust, how to build it, and what to do when trust is broken in a collaborative team environment; contains a compilation of best practices and research for building trust.

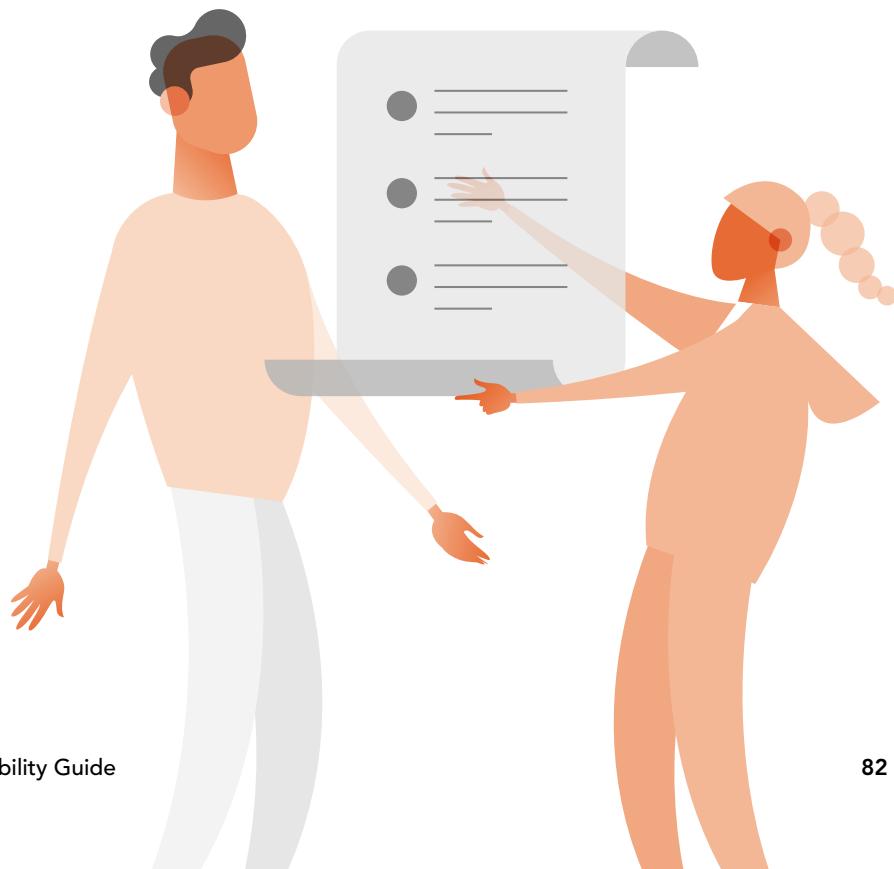


Conclusion

This guide acts as a road map to increase the sustainability of Compassionate Community initiatives at any stage in their development. The content was developed through a literature review followed by consultations with subject matter experts in the field. This led to a collection of best practices and resources to initiate these best practices when needed. The content will ensure you are maximizing the initiative's resources—efficiently progressing your Compassionate Community's work.

As your initiative moves through the stages of development, return to the guide for support with any new areas. Remember, the Compassionate Communities Sustainability Guide was designed as a resource you will use for years to come.

Pallium continues its commitment to creating supportive resources for those leading the Compassionate Community movement. With that in mind, come back to www.pallium.ca to see the latest products, resources and look for any updated version of this guide.



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