

SETTING DIRECTION¹

INSTRUCTIONS: Finding common cause among partners and coming to agreement about the collaboration's outcomes, strategies and resources is key to its success. Use the following process outline to set your directions and identify the capacities, resources, expertise and appropriate roles and responsibilities required to implement them.

1. WHAT IS OUR VISION FOR THE COLLABORATION?

Definition: Visioning is the exercise of constructing a mental picture of a better and different future that results from the collaboration's efforts. It provides an opportunity to open partners' thinking about possibilities. It must be developed and agreed to by all collaboration partners and be easily communicated to the leadership within each partner's organization and to other stakeholders. It should stretch, challenge and inspire partners, but be plausible. It should also help partners to make decisions and choices about the collaboration's directions when faced with competing priorities and options.

Why it's Important. It provides a:

- Compelling aspiration that propels partners forward
 - Shared direction that coalesces multiple interests and mandates
 - Beacon when opportunities and challenges pull partners in different directions
 - Reminder that a collaboration is a means to an end, not an end in itself
 - Ultimate destination against which to measure success
-

2. WHAT IS THE CONTEXT OF OUR WORK?

Definition: The context provides a backdrop for setting the collaboration's goals and strategies. It articulates the key issues, needs and problems that the collaboration has come together to address and describes the environment in which the collaboration is working. Its primary purpose is to generate information that helps stimulate thinking and insights that lead to the best possible strategies.

Key Questions:

- What is the critical issue(s) which brought us together? Are they still relevant and why?
 - What problems or needs are we seeking to address?
 - What trends, opportunities and threats surround the issue(s), problems and need?
 - What resources do we have to work with? What approaches are currently being utilized by our collaboration partners?
 - What guiding principles or values do we share and how do they affect our direction?
-

¹ Drawn from: Building Strong Foundations, Enhancing Organizational Capacity: Strategic Planning Toolkit, Canadian Mental Health Association, Ontario, Linda Mollenhauer and A Framework for Collaboration on Health Policy Development: A Tool for Voluntary Organizations Working in Health, Health Canada and the Public Health Agency of Canada

3. WHAT ARE OUR STRATEGIC PRIORITIES AND OBJECTIVES²?

Definition: Strategic outcomes and objectives set out the intended results of the collaboration's work. They need to link clearly to the vision. They must provide enough detail to inform actions, but be broad enough to incorporate the interests and needs of all collaboration partners and flexible enough to promote innovation and responsiveness. They should be realistic, concrete and measurable; otherwise, they are only well intentioned wishes.

Why it's Important. It provides a:

- Road map for arriving at the collaboration's vision
 - Set of concrete directions against which the work of the collaboration is measured; resources are obtained and allocated; and roles and responsibilities are set
 - Focus to avoid drifting
 - Umbrella to integrate the programs, processes and people partnering in the collaboration
-

4. WHAT ARE THE STRATEGIES AND ACTION STEPS THAT WILL ACHIEVE THE STRATEGIC OUTCOMES AND OBJECTIVES AND WHAT IS REQUIRED FOR IMPLEMENTATION?

Definition: The strategies and action steps and implementation lay out how the strategic outcomes and objectives will be achieved, what capacities, resources and expertise are required, the timelines and the roles and responsibilities. They should recognize the strengths, knowledge, expertise and resources each of the partners can bring to the table.

Why it's Important. They provide an opportunity to:

- Test the feasibility of the strategic priorities and objectives and each partner's commitment to them
- Consider how each partner can contribute to the collaboration
- Identify ways to be innovative and overcome barriers
- Set expectations for accountability to funders, partner organizations and each other

² Other language can be used to describe strategic priorities and objectives, such as strategic imperatives, outcomes or goals.

