

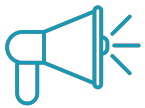
Role of the CA backbone

In collective action (CA) work, backbones are the teams that provide critical long-term support for the initiative over its lifetime. Each backbone team looks different depending on the specifics of the initiative and its community; however, backbones generally play three key roles in an initiative:



Facilitator

Facilitating strong communication, collaboration, and culture across the initiative's work. Not the decision maker—instead, backbones support the creation of equitable processes for sharing leadership & accountability among members and with the wider community; as well as the culture of trust, partnership, and learning needed to support the work.



Advocate

Building public will and resources for the collective work. Looking for opportunities to amplify efforts through collaboration with similar initiatives.



Data manager

Managing the shared performance measurement system, including supporting data collection, analysis, and reporting. Championing the initiative's culture of continuous learning and improvement.

As a CA initiative matures, its work evolves with emerging learnings and changing conditions. Backbone teams help ensure that initiatives have the capacity they need to be highly effective and adaptive over time while staying true to their mission and values. However, the focus of backbone work tends to shift in the process; often, backbones begin their work more deeply involved in design and implementation support, including setting up group processes and structures that will make effective collaboration possible. In later stages, with initiative partners owning much more of the implementation work, backbones tend to shift their focus towards supporting ongoing collaboration, communication, and learning & measurement goals.

Functions of the CA backbone

As backbone, teams typically perform six key functions:

- 1. Center equity and the common purpose**
Guide strategy, alignment, and evolution of the initiative towards equity and the common purpose.
- 2. Support aligned activities**
Support coordination and collaboration across the initiative to ensure work is on track, mutually reinforcing, and aligned towards the vision.
- 3. Manage shared data, learning, and measurement systems**
Manage shared performance measurement of the initiative for the purposes of learning, evaluation, accountability, and telling the story of the collective work.

4. **Cultivate community leadership and engagement**

Cultivate community leadership of the initiative through intentional relationship building, and by sharing and shifting decision making power to those closest to the collective work.

5. **Support community-led advocacy and policy change**

Support community-led advocacy and policy change to remove barriers to collective progress.

6. **Secure and develop initiative resources**

Secure, develop, and mobilize resources for the initiative, including fundraising and recruiting staff and other non-monetary supports.

Best practices in CA backbone work

The following best practices illustrate strength in backbone work. Each best practice includes a list of examples of what this practice looks like in action:

Function 1: Center equity and the common purpose

Guide strategy, alignment, and evolution of the initiative towards equity and the common purpose.

Practice A: Ensure a focus on and practice of equity in the culture, design, and implementation of the initiative's work.

- Ensuring there is a shared definition of equity and its importance to the initiative's success.
- Ensuring there is consistent use of an equity lens in the initiative's decision making processes, especially those concerning the design, implementation, and progress measurement of the initiative's work.
- Clearly and intentionally supporting a shift in power back to the community, especially as this relates to setting the vision, definitions/measures of success, and core strategies for the initiative (e.g., ensuring community leaders are sitting in positions of power, which may include reconfiguring the initiative's leadership & decision making structures; taking time to build community awareness, engagement, and leadership).

Practice B: Ensure the challenge & common purpose of the initiative are clearly articulated and deeply understood in context.

- Ensuring the processes for defining the challenge and common purpose are transparent, equitable, and center the community members closest to the challenge (i.e., those most directly impacted by and impacting the challenge).
- Ensuring there are shared, clear definitions of key terms related to the initiative's work (equity, community, system, etc.).
- Conducting a historical analysis of the central challenge(s) to identify the underlying causes the initiative is working to address. This analysis includes key barriers to and assets used in current, historical, and local work to address the challenge; what strategies have been tried previously; and leverage points in the work to address root causes.
- Conducting an analysis to understand where power and trusted resources (community leaders, organizations and institutions, funding, etc.) currently sit in the community and how the initiative can best leverage these in the collective work.
- Clearly communicating the learnings from systems analyses with initiative and community members.

Practice C: Ensure the core strategies of the initiative are clearly articulated, equitable, and targeted.

- Ensuring the process for defining strategies is transparent, equitable, and centers those closest to the implementation of each strategy (i.e., those most directly impacted by and impacting each strategy).
- Defining how each strategy drives action towards the common purpose.
- Defining the intended impact of each strategy (e.g., Which specific groups will this impact? By how much? By when?).
- Conducting a racial & economic equity impact assessment to understand how different racial, ethnic, and economic groups will likely be affected by the initiative's proposed strategies and work (e.g., using a Racial Equity Impact Assessment Tool to evaluate new policies, programs, decisions).
- Mapping the key stakeholders who are already working on these strategies and the relationships among them.
- Identifying barriers in the way of implementation and proposing methods for addressing them.

Practice D: Continuously revisit, refine, and align the strategies of the initiative to ensure they remain relevant to the common purpose and changing conditions of the initiative.

- Developing a Theory of Change (or logic model) for the initiative that includes shared outcomes and metrics aligned with the initiative's vision, strategies, and related activities. This process should include identifying and engaging stakeholders who are impacted by and/or impacting the challenge(s) on which the initiative is focused.
- Regularly revisiting and refining the initiative's logic model with key stakeholders based on learnings
- Ensuring the design, implementation, and measurement of initiative activities remain aligned towards the common purpose.

Function 2: Support aligned activities

Support coordination and collaboration across the initiative to ensure work is on track, mutually reinforcing, and aligned towards the vision.

Practice A: Facilitate and coordinate collaboration and communication across the initiative.

- Facilitating the process of creating shared definitions in the initiative's work (e.g., "equity," "community," "system," "stakeholder").
- Nurturing strong, trusting partnerships and collaborations among members and across the initiative's work.
- Working with initiative partners to clearly establish group agreements, partnership agreements, and other infrastructure needed to support ongoing participation (e.g., setting participation expectations, creating MOUs and charters).
- Exercising facilitative leadership (i.e., empowering teams to work towards a common goal while balancing results, process, and relationships).
- Designing and facilitating convenings of diverse groups of stakeholders that are meaningful and reflective of the different ways in which members best engage.
- Facilitating difficult and necessary conversations among members when needed.
- Managing communications and media to nurture relationships, support collaboration, and increase the transparency and accessibility of the initiative's work among partners and with the broader community.
- Providing tactical support for implementation (e.g., project management and logistical support).

Practice B: Seek out opportunities for alignment with other efforts.

- Conducting a landscape analysis to understand what similar and/or complementary efforts exist related to the work of the initiative
- Recruiting initiative partners who are well positioned to address the challenge (e.g., through their existing work in the community, their lived experience, and/or expertise in understanding the challenge, etc.)
- Being actively involved in the initiative's community and network (e.g., volunteering, attending community gatherings, hosting community-wide events)
- Sharing learnings and best practices with the field (e.g., attending and/or speaking at conferences, sharing resources, engaging in online communities focused on similar work)
- Looking for opportunities to amplify the initiative's work by collaborating with similar or complementary efforts

Function 3: Manage shared data, learning, and measurement systems

Manage shared performance measurement of the initiative for the purposes of learning, evaluation, accountability, and telling the story of the collective work.

Practice A: Facilitate the development and management of the initiative's participatory evaluation process.

- Assessing the initiative's current capacity to conduct evaluation and/or need to bring in additional evaluation support
- Identifying key stakeholders to drive the design of the evaluation process (i.e., those who are directly affected by and/or carrying out evaluation work)
- Facilitating discussions to determine the goals of the evaluation process
- Facilitating discussions to determine what data to collect based on evaluation goals and metrics identified in the initiative's logic model, and how this data will be collected and used (this includes understanding what data members are already collecting and what data is already available in the community related to the initiative's outcomes and measures)
- Facilitating discussions to determine what learning questions should drive analysis and disaggregation of the initiative's data
- Facilitating regular data talks among stakeholders to make sense of the collected data, including celebrating progress and determining changes needed (e.g., ensuring there is standing time at advisory and action group meetings to review and discuss data together)

Practice B: Activate or create the shared measurement system of the initiative for collecting, analyzing, and reporting data.

- Developing and/or implementing the shared measurement platform/tool based on evaluation goals & needs, tools & methods that are easiest for stakeholders to access, and data sharing & privacy protocols
- Dedicating the needed backbone capacity (e.g. staff, time, training, funding) to facilitate the initiative's performance measurement processes (e.g., managing data collection across partners, analyzing data, sharing data back with partners and the wider community on a regular basis)
- Creating and implementing a process to ensure regular, accurate data collection and analysis
- Analyzing data with a deep understanding of the contexts that have contributed to the existence and perpetuation of the initiative's central challenge
- Sharing back data and analysis in the formats members have determined work best for different audiences (e.g., dashboards, publications, data visualizations, interactive data)

- Determining how data analysis can help drive storytelling about the initiative's progress, strengthen accountability to and transparency of the work, and serve the learning goals of the initiative

Practice C: Support a culture of continuous learning and improvement.

- Building, practicing, and supporting a culture that values the continuous evolution of the initiative's work.
- Being willing and able to support shifts in the initiative's practices, processes, and policies based on data analysis and learnings.
- Facilitating regular discussion around setting, measuring, and reflecting on evaluation data and learning goals for improvement purposes.
- Providing and/or securing training & technical assistance to help build the initiative's data capacity.

Function 4: Cultivate community leadership and engagement

Cultivate community leadership of the initiative through intentional relationship building, and by sharing and shifting decision making power to those closest to the collective work.

Practice A: Shift initiative leadership & decision making power to community members who are closest to the work (those directly impacted by and impacting the initiative's central challenge).

- Assuming the role of the initiative's facilitator and steward as opposed to acting as the initiative's primary decision maker.
- Facilitating discussions to define what, who, and where "community" is in the context of the initiative.
- Facilitating the process for initiative members to co-design a leadership and decision-making structure that shifts power to the community members who are most directly impacted by and/or impacting the initiative's work.
- Providing support for community members who are stepping into new leadership opportunities for the initiative or who are stepping down to make room for new leadership development.

Practice B: Intentionally and continuously engage community to ensure the vision, design, implementation, and measurement of the initiative's work are community-led.

- Ensuring the initiative's approach to all work continues to be place-based (i.e., emphasizing and understanding the issues, interconnections, and relationships in a specific place as the foundation for determining coordination of action and investment).
- Staffing the backbone team to ensure it reflects the initiative's community.
- Ensuring the backbone team has the capacity (e.g. time, skills & training, local knowledge, funding) for intentional community engagement, relationship building, and community leadership development.
- Ensuring initiative members work with community members in ways that do not perpetuate harm (e.g., holding implicit bias trainings, building and repairing trust).
- Identifying and intentionally building relationships with trusted community leaders, especially as this relates to understanding how trust and relationships are developed and strengthened in a specific community.

Function 5: Support community-led advocacy and policy change

Support community-led advocacy and policy change to remove barriers to collective progress.

Practice A: Support community-led advocacy & policy change efforts.

- Raising awareness of and building momentum for the collective work in the initiative's community.
- Driving different methods of storytelling about the collective work (e.g., awareness campaigns, media exposure).
- Leveraging, supporting, and deferring to community-led advocacy and policy change efforts (i.e., focusing on what matters most to the initiative's community, helping to connect community members with local power brokers, supporting and amplifying the community's capacity to advocate for itself/
- Valuing and finding opportunities to intentionally develop community self-leadership in the initiative's work.

Practice B: Create and use a systems lens to address the initiative's central challenge.

- Continuously using, refining, and communicating the systems analyses of the central challenge that the initiative is working to address (e.g., findings from landscape, root cause, power, and historical analyses).
- Identifying key points in the system where action and attention create the biggest impact.
- Understanding and communicating how collective action works as an approach to systems change, which will involve multiple stakeholder groups across a number of years.
- Building a collective action knowledge & practice base with initiative partners and other community members.

Function 6: Secure and develop initiative resources

Secure, develop, and mobilize resources for the initiative, including fundraising and recruiting staff and other non-monetary supports.

Practice A: Sustain and develop its role as the backbone team in order to ensure capacity for the long-term alignment of and support for the initiative's work.

- Building and nurturing relationships with the leadership of the organization(s) in which the backbone team sits to ensure support for backbone team members and their work.
- Regularly assessing what capacity (e.g. staff, training, funding) is needed for the backbone to successfully perform and sustain its functions.
- Continuously ensuring backbone capacity needs are met (e.g., hiring and onboarding, training).
- Ensuring backbone staff are supported and prepared to perform core functions (e.g., supporting staff wellbeing, ensuring professional development opportunities, using reflective supervision practices).
- Planning for staff and partner turnover to ensure long-term sustainability of the initiative's work (e.g., developing clear backbone hiring and onboarding protocol, documentation of the initiative's institutional memory, etc.).

Practice B: Secure stable funding sources to support the initiative's work.

- Developing and refining the initiative's funding model (inclusive of multiple funding sources).
- Building and nurturing relationships with funders to ensure sustained monetary support for the initiative
- Driving the impact reporting and storytelling of the collective work.
- Facilitating discussions with funders to ensure goal alignment, build understanding of collective action, and set expectations related to financial commitment as the initiative evolves over time.