



Ministry of Education  
The Pedagogical Secretariat



# Collaboration Architects

**A Model for Planning and Leading Collaborative Processes Concerning Complex Issues**

September 2023

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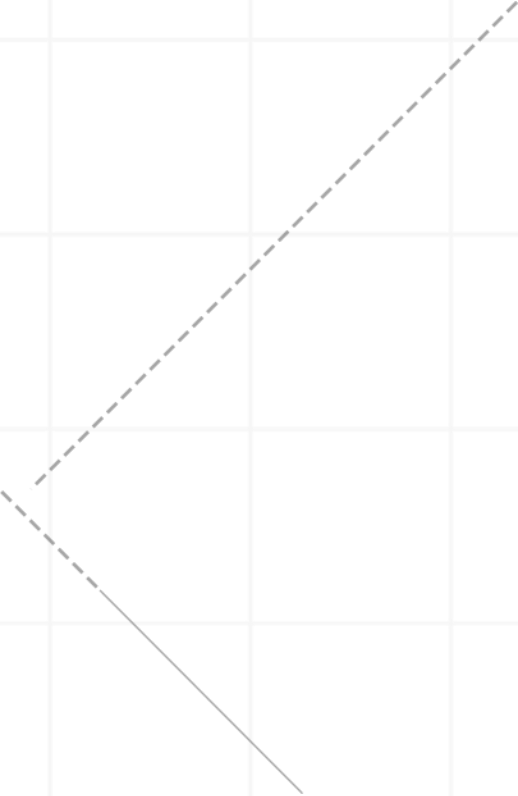
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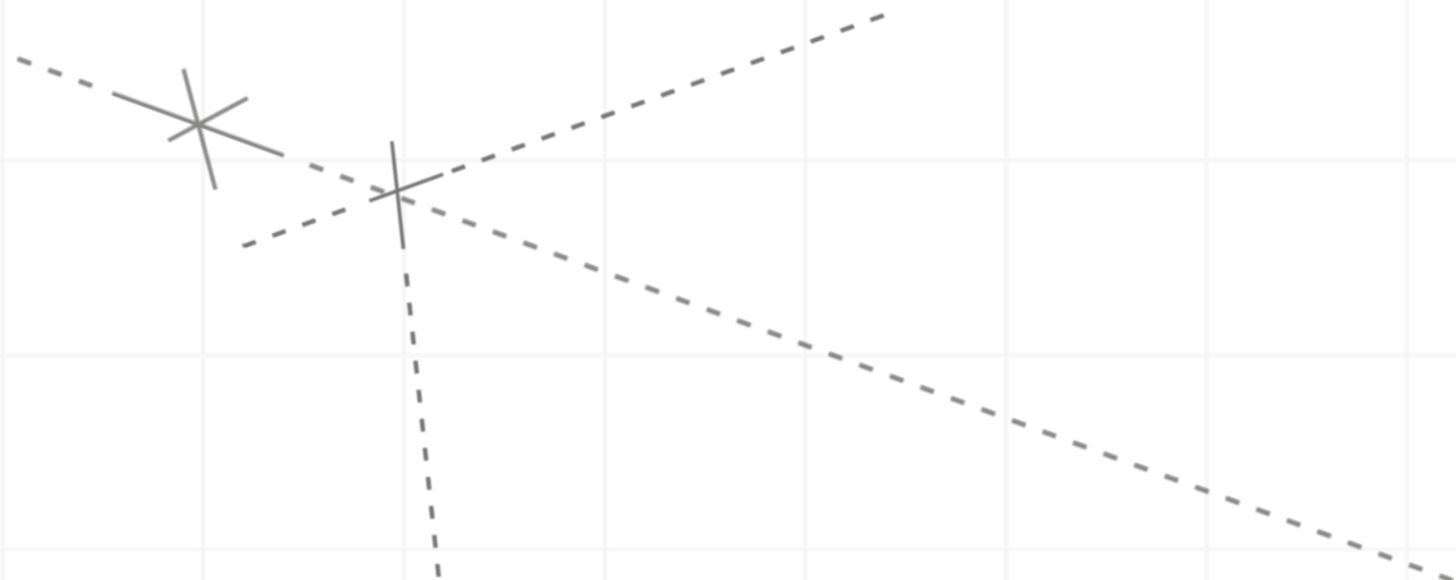
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# Foreword

Dear friends,

For the past decade, the Pedagogical Secretariat of the Ministry of Education has been leading a variety of collaborative processes as part of its policy of **shared governance**. As part of this policy, stakeholders, experts and civic groups are involved at various levels of decision-making, and of shaping and implementing the education policy.

Collaborating using varied engagement methods, at different levels and fields, enables the bureaus and departments of the ministry to receive information and encounter new ideas, to plan in a more relevant and efficient manner, to identify obstacles and disagreements, to increase trust and legitimacy, to become acquainted with the work of the ministry and to engage partners in the implementation process and in general. Over time, these collaborations can significantly improve decision-making processes and their execution.

We believe in the concept of partnership as a value and as a way to best promote and implement the ministry's policies. As such, we encourage departments and bureaus in the secretariat to lead processes in a spirit of shared governance when dealing with various educational challenges.

**"When you see someone putting on his Big Boots, you can be pretty sure that an Adventure is going to happen."** (Winnie-the-Pooh, A.A. Milne)

I wish you many collaboration adventures...

Sincerely,

**Inna Saltzman,**  
deputy director-general and head of the Pedagogical Secretariat

לציון אינה

**Dear partners,**

We are excited to present to you the **Collaboration Architects** booklet, which consolidates the concepts and practices on which we based the planning and leading of collaborative processes in the ministry.

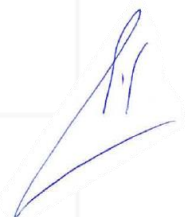
For the past few years, the Ministry of Education has been spearheading the Collaboration Architects program, a unique course for ministry officials, with the aim of providing professional training for planning and leading collaborative processes.

In this course, the collaboration architects are trained to deal with complex issues, and the processes they have led in the past few years have indeed produced results that indicate improved decision-making and better performance. The changes within the collaboration architects continued to have an impact and echoed among the process partners and the organizational environment in general.

We invite all officials to use this booklet to learn, expand and implement the procedure for leading a collaborative process, when dealing with a complex issue that requires the involvement of a variety of stakeholders.

**Sincerely,**

**Lilach Aplatón,**  
head of the Plans and Partnerships Bureau



# Acknowledgements

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To **Gideon Zailer** and **Inbal Vaknin** for their professional assistance and close partnership,  
Thank you to **Adi Simon Bar** for compiling and writing this booklet, and for bringing it to fruition...



# Introduction



## How Was the Model Created?

In the past decade, the Plans and Partnerships Bureau of the Pedagogical Secretariat has been planning and leading a wide range of collaborative processes concerning complex systematic issues that have extensive organizational implications. As part of these processes, government bodies, business companies and third sector organizations, as well as stakeholders from various fields, experts and community groups, are involved at various levels in the process of sharing and formulating recommendations with the purpose of promoting the Ministry of Education's policy and its implementation. These processes enable ministry officials to receive information and encounter new ideas, to plan in a more relevant and effective manner, to increase trust and legitimacy, to enable relevant partners to become acquainted with the ministry's work and to engage them in the ongoing implementation process.

The purpose of this booklet is to share the knowledge and experience gained by the Ministry of Education in all aspects of planning and leading collaborative processes. This model can be applied in many different contexts: business management, urban planning, health care, disaster preparedness, regulation, international projects and more. The model is designed to facilitate the success of such processes, thanks to its structured and systematic, step-by-step description of their planning and leading stages. It also includes guidelines, insights and implementation suggestions.

**Best of luck!**





## Collaborative Processes - Why and When?

In the public sphere, **the collaborative process** is the **joint effort of diverse stakeholders in developing a shared product**, which is expected to **impact large segments of the population**, such as a treaty, a document of recommendations, a model for implementation, etc.

The collaborative process is a tool that helps policymakers in their policy-making and decision-making processes. As part of this process, policymakers turn to stakeholders, experts and/or the general public for their help, to learn from them and to involve them at various levels in the decision-making processes, in order to promote the ministry's policy and its implementation.

The conceptual framework for collaborative processes in the Ministry of Education is **"shared governance"**, which holds that a shared discourse between all relevant stakeholders is a crucial factor in the ability to make better decisions that can be implemented in practice. When there is an open dialogue between the various stakeholders, it brings about new perspectives and innovative solutions that were not previously considered. The collaborative dialogue also enables stakeholders from different sectors to build a culture of partnership, trust and mutual contribution.

The collaborative processes described in this booklet are a way to involve different authorities in the conversation surrounding complex, and occasionally even "sensitive", issues, which cannot be definitively answered by just one authority. We will consider the types of collaborative processes that differ from one another in their purpose, their modus operandi, their final outcome and their level of complexity.

The complexity of the collaborative process stems from the issues under review and their degree of sensitivity, the large number of participants involved and their level of interdependence.



## Collaborative Processes - Why and When?

In terms of participants, the collaborative process usually includes dozens of partners from diverse backgrounds and fields: representatives from the public sector, the business community and the third sector, community members, relevant experts and more.

In addition to this, there is the complexity of the issues in question, which are often a sensitive subject for those involved, who have different and sometimes conflicting interests. The job of the process leader is to ensure that all voices are heard and to create balance between everyone.

Due to its complexity, the collaborative process necessitates effort, availability and time. As such, **it is not recommended to start a collaborative process for every issue**. Before choosing to embark on a collaborative process, it is important to make sure that the issue justifies such a process, and that carrying one out will have significant added value.

**The purpose** of the model, which will be presented in the following chapters, is to simplify the process as much as possible.



## Benefits of Collaborative Processes

### Innovative solutions for the general population:

The process has the potential to foster innovation, thanks to the collective knowledge, expertise, creativity and diverse fields of the stakeholders. The process encourages thinking outside the box and exploring unconventional solutions.

### Relevant, long-term and sustainable solutions:

For issues that require long-term planning and sustainable solutions, the collaborative process enables greater engagement of stakeholders, thereby increasing the likelihood of finding solutions relevant to the wider community, as well as the odds of a successful and long-term implementation.



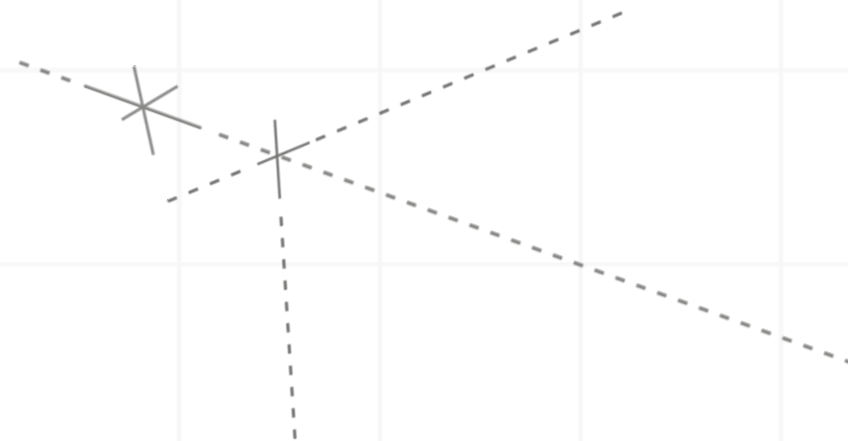
## When Should We Employ Collaborative Processes?

When at least one of the following conditions is met:

**A complex and influential subject:** Collaborative processes are suitable for complex problems affecting a broad population and involving multiple stakeholders with diverse perspectives, interests and areas of expertise. For complex issues, a collaborative process can help find a more holistic solution.

**Controversial and high-interest subjects:** In situations where there is high risk and significant disagreement between stakeholders, a collaborative process can help build trust, mitigate conflicts and create a common basis for mutual agreements.

**Interdependence of multiple stakeholders:** Issues involving multiple stakeholders at different levels of influence and dependence are considered complicated. This interdependence can create challenges that require a collaborative process.



## Important Questions to Ask

**What** is the added value of the collaborative process on this subject?

**To what extent** is the issue relevant and part of the public discourse?

**Which** blind spots can a collaborative process illuminate?

**Is there** time and availability to carry out the process?

**Is** this the right momentum?





## Ethics in Collaborative Processes

Ethics are an essential component of collaborative processes; they are necessary to maintain integrity, build trust and ensure the overall legitimacy of the processes. The ethical code of the collaborative process serves as a guide for acceptable and appropriate behavioral norms, and it is recommended to agree on one with the partners from the outset. Common ethical principles can help bridge differences, disagreements or conflicting interests, because they establish an agreed upon common ground.



## Essential Ethical Principles for Collaborative Processes



**Confidentiality and Privacy:** Ethical considerations include respecting the confidentiality and privacy of sensitive information shared with stakeholders during the joint effort.



**Transparency:** It is important to disclose to the partners all information relevant to the issue in an honest and accurate manner.



**Respectful Communication:** All participants should engage in respectful and constructive communication, and value diverse perspectives even when disagreements arise.



**Fair Representation:** It is important to ensure that all relevant stakeholders are included and that everyone's voice is meaningful in the process. Efforts must be made to represent diverse points of view.



**Social and Environmental Responsibility:** The social and environmental consequences of decisions made in the process must be taken into account, while striving to find solutions.

# Chapter 1: A Bird's-Eye View of the Model



# A Bird's-Eye View of the Model

The model outlined below provides a generic structure of a collaborative process, and serves as a skeleton for planning and leading a process that can be tailored to the issue and to the participants. The model presents essential operating principles and milestones. The actions detailed in the planning phase are identical for all collaborative processes, whereas the leading phase may vary in its actions depending on the specific process. In a short process, focused on informing or coordinating for example, if there is only one collaboration meeting, there is no need to present the product. This is in contrast to a longer process, such as a cooperation, in which the product is presented at the final meeting

Even if we skip an action from the model, due to its incompatibility to a specific process, it's important to stick to the chronological order of actions outlined by the model both in the planning and in the leading phases. Each action builds upon the previous one, forming an additional tier upon which we will continue to expand. Thus, the model assists in creating an optimal, coherent and accurate collaborative process step by step.

## 50% Execution - 50% Planning

Before we dive into the details of the various stages of the model, we will briefly review its structure from a bird's-eye view. The model for planning and leading collaborative processes consists of two equally important parts, planning and leading. Both phases require the same amount of time for execution.



The planning phase is critical for the success of the process. To succeed in leading the execution and before inviting partners, it's essential to thoroughly plan all aspects of the process, ensuring no loose ends or gaps, and to complete the necessary preparations. To this end, **the planning phase must be just as thorough and lengthy as the leading phase, as inadequate planning may result in costly failures.**

The planning phase is conducted in collaboration with the assistance team, a group of 2-3 individuals who work closely and step by step with the process leader. Together, they develop a detailed scenario that clearly defines the objectives and intended outcomes of the process.

The planning consists of 8 steps, which **should be carried out one by one, in chronological order**, because each step relies on its predecessor. First, we will ascertain what need is being addressed, identify the variety of factors at stake, and determine the purpose of the collaborative process. Then, we will define the anticipated product, that is, what we want to achieve at the end of the process. Now that the desired outcome is clear and precise, we will choose the type of collaboration suitable for reaching it (informing, coordinating, consulting or cooperating) and formulate the collaboration question - the question with which we will set out, the "answers" of which will be presented as part of the final product.

Only after characterizing the process can we move forward to mapping out the partners, i.e. choosing the stakeholders relevant to the issue at hand. Choosing the partners will help identify possible landmines, disagreements, sensitive topics in discourse, etc.

The planning phase concludes with the creation of a clear Gantt chart, specifying meeting dates and preparing for each meeting in detail. This includes selecting engagement methods tailored to suit participants and to promote the development of the anticipated product. By the end of the planning phase, the process should be outlined and defined in its entirety, to ensure that the leading phase is effective and will achieve the anticipated product.

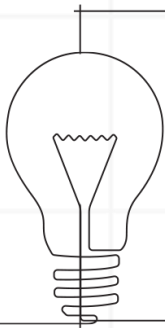




## The Planning Phase



To advance the planning process, we recommend having one or two sessions weekly with the assistance team. For complex processes, it is possible to use external organizations instead. Together with the assistance team, "stitch" the meetings as tightly as possible, in order to build an effective process and prevent "surprises" along the way.



**Note:** If you begin the leading phase without meticulous planning, the process may end without a product.

At the end of the planning phase, after clarifying the process structure and desired outcomes, it is time to proceed to the leading phase.

After the partners are invited to join, the process is divided into two layers: meetings involving all partners on one hand, and their analysis within a task team on the other. Throughout the process, the assistance team supports the process leader by offering advice, feedback, and refining the process as needed.

Leading collaborative processes requires different actions depending on the type of collaboration. As we will see later on, informing is fundamentally different from other processes. Moreover, a more complex process is lengthier and requires additional components. Furthermore, in coordinating, consulting, and cooperating processes, beside leading the collaboration sessions (carefully prepared during the planning phase), there are two repetitive actions: **development and validation** between meetings.

"Development" entails gathering information provided by participants and transforming it into a coherent visual product that can be later shared. It is a skillful process of gathering ideas and presenting them creatively. The development is managed by the process leader and a "task team" (which includes the assistance team and additional participants), who work together to advance the process and the production of the anticipated product.

After the product development comes validation, during which all participants are invited to contribute comments, feedback, and additional input. Validation is essential for the collaborative process as it facilitates consensus-building surrounding the emergent product.

## The Leading Phase



In collaborative processes such as coordinating, consulting or cooperating, or such that require more active participant involvement, the leading phase usually consists of 8 stages. We will begin with a blessing from the supervisor, who will endorse the move and emphasize its importance. Afterwards, we will provide an overview of the issue's background, present the collaboration question and anticipated product, and address ethical considerations. Our goal is to align participants' expectations, and prevent misunderstandings and deviations later on in the process.

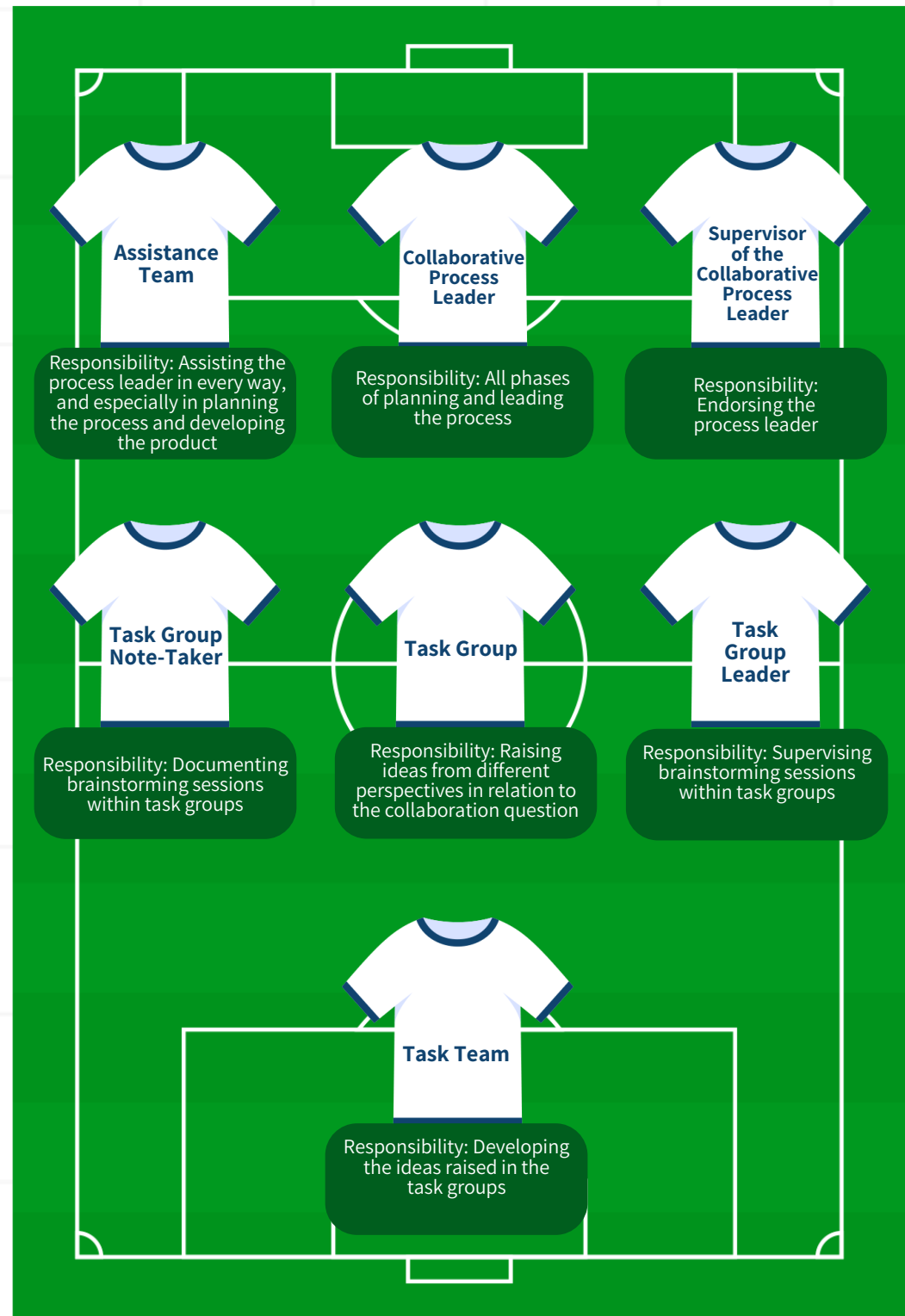
In other words, the process leader is responsible for gathering the information from the task groups, updating on progress, and synthesizing all ideas into a final product. The leading phase ends with the production and distribution of the product, for which we set out in the first place.

## Main actors

Planning and leading the collaborative process is not a one-person endeavor; it requires the collective effort and collaboration of multiple actors. However, it is important to emphasize that in some processes, actors may be "benched". For instance, in informing processes, there are no task groups, and as such, no group leaders or note-takers. Furthermore, informing processes do not include product development, hence eliminating the necessity for a task team. The actors always in the game are the supervisor, the leader, the assistance team and the participants in the collaborative process.

It's also important to note that sometimes the same people play multiple roles. For example, the task team responsible for developing the product can include the assistance team and the group leaders.

## The actors involved in the process and their roles:

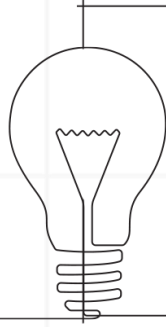


## Types of Collaborative Processes

There are four types of collaborative processes, which differ from each other in their goals and action plans.

### Types of Collaborative Processes





**Keep in mind:** No type of collaborative process is better than the other. Each type of collaboration answers a different need, is conducted in different ways and will result in a different outcome.

## What might happen in different types of collaborative processes?



# Chapter 2: The Planning Phase



# The Planning Phase

Following are the steps to take when planning the collaborative process. Each step builds on the step that precedes it, so it is important to proceed in the order presented here. It is recommended to plan each step with the help of the assistance team, to discuss it at length, and to examine it in depth before moving on to the next step.



## Defining the Need

Planning the collaborative process begins with defining the organizational need under consideration. To accurately define this need, it is necessary to study the issue in a comprehensive and in-depth manner.

Defining the need includes:

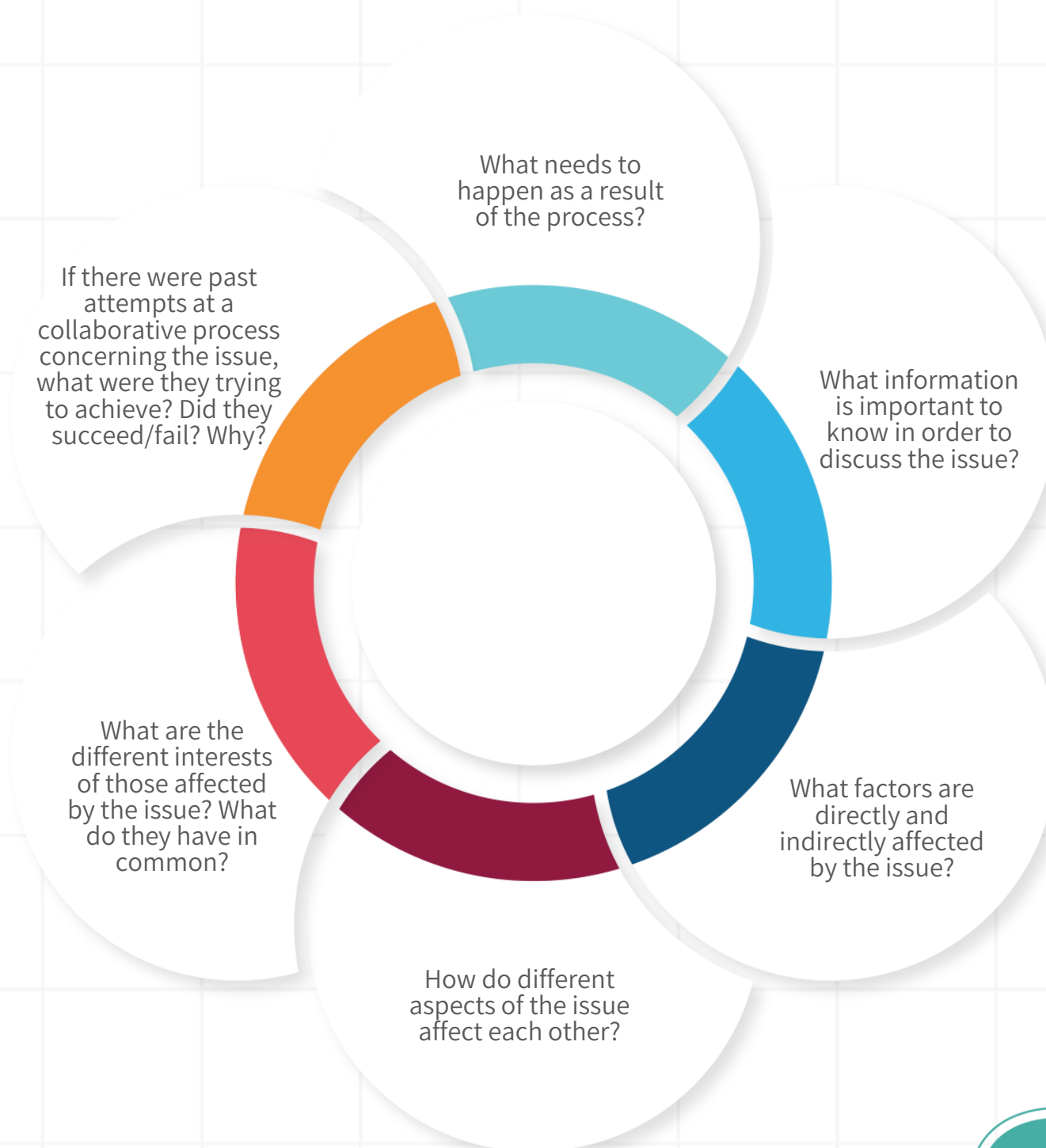
- Preliminary research on the issue
- Data collection and analysis
- Review - how the issue has been handled until now
- Breaking down the various components and aspects of the issue (and their interdependence)
- Examining existing solutions and trends - in Israel and around the world

After defining the need, presenting it to the partners will prompt a focused discussion, fostering trust and facilitating the creation of a relevant product. The partners' consensus on the need will serve as the foundation for establishing the collaborative process in practice.





## Important Questions to Ask



Need

Anticipated  
Product

Process  
Type

Collaboration  
Question

Partner  
Mapping

Identifying  
Landmines

Gantt Chart

Planning  
Meetings



## Anticipated Product

The anticipated product is derived from the need and is the outcome of the collaborative process.

Each collaborative process concludes with the production and publication of a product: a policy document, a recommendation report, a joint work plan, a tool, a model, etc.

It is important to accurately define the product, because it helps to establish the scope of the process.

Each collaboration type has a typical anticipated product, so the choice of product will affect the type of collaboration.

### Examples of Anticipated Products According to Collaborative Process Types

Informing	Coordinating	Consulting	Cooperating
Publication and promotion of a particular topic	Document outlining consensus, partner mapping, and areas of responsibility	Information gathering, recommendation report, model, responses to an existing draft	Joint work plan, mechanism, model

## Important Questions to Ask

What would be the outcome, that will be shared with others?

How do we present the conclusions and insights?

Which product will best answer the need?



Need

Anticipated Product

Process Type

Collaboration Question

Partner Mapping

Identifying Landmines

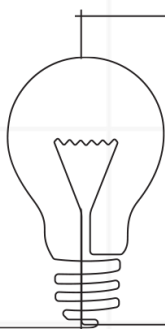
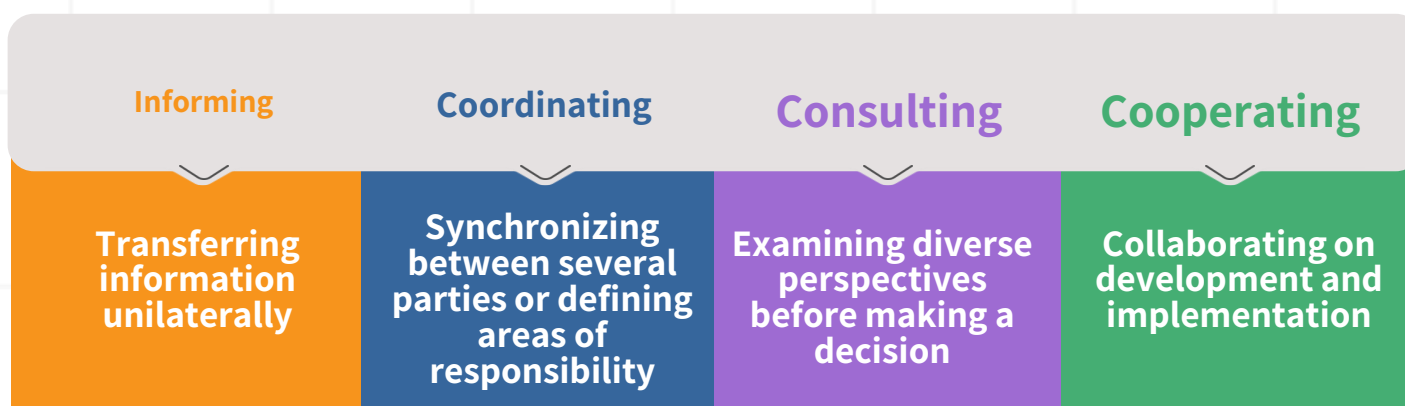
Gantt Chart

Planning Meetings

## Process Type

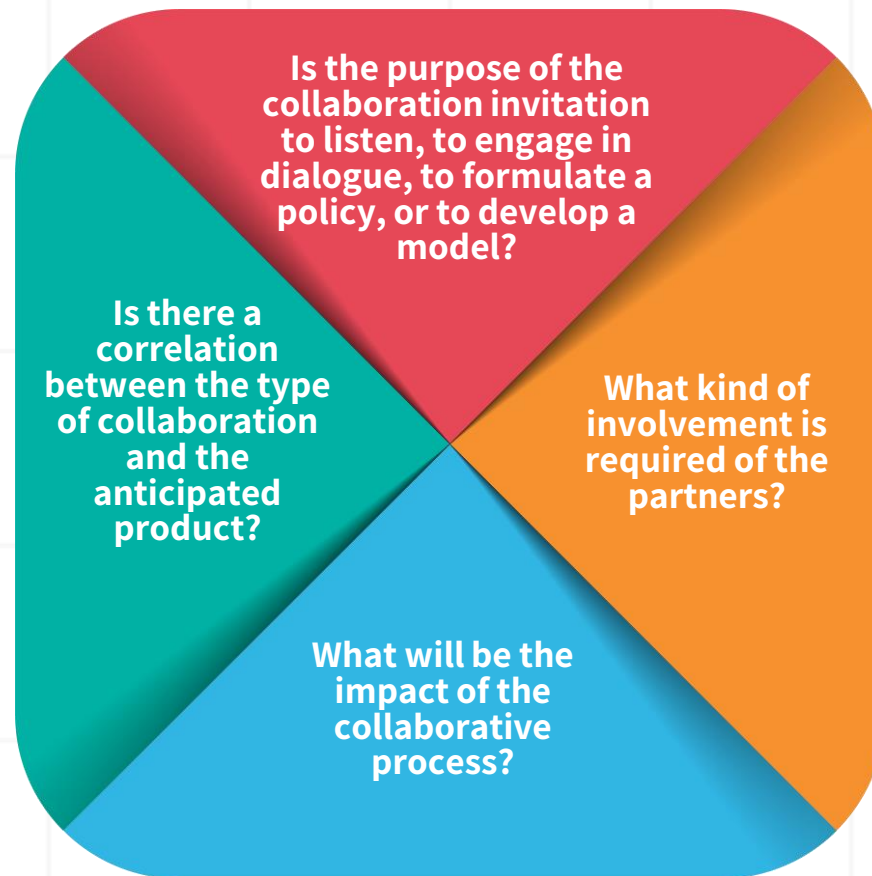
As mentioned earlier, each type of collaborative process is suitable for producing a different product. Since each collaborative process has a different purpose and a unique set of actions, it's crucial to precisely identify the type of process and ensure that it correlates with the anticipated product.

### Purpose of Each Process Type



**Note:** It is not possible to have two types of processes as part of one collaboration (e.g., both informing and consulting). When two types of collaboration are needed, two separate processes must be carried out.

## Important Questions to Ask



Need

Anticipated  
Product

Process  
Type

Collaboration  
Question

Partner  
Mapping

Identifying  
Landmines

Gantt Chart

Planning  
Meetings

## The Collaboration Question

The collaboration question is derived from the anticipated product.

Similarly to the anticipated product, the collaboration question defines the scope of the process and helps create focus and clarity. The collaboration question helps in partner selection and expectation management. It is important to pay attention to the wording of the question to ensure it aligns with the type of collaboration planned.

Although the collaborative process deals with a complex issue, the collaboration question focuses the conversation on a single, potentially influential aspect of the whole. Formulating the collaboration question may require setting aside certain topics and postponing them to a later date. Nonetheless, a refined question is crucial, as it enables partners to start the process within a well-defined framework.

A good collaboration question encourages partners to make a meaningful impact, aligns with the identified need, and inspires collaborative efforts toward achieving the desired product. It is important to formulate a well-defined question to ensure that the ensuing process remains focused and that the topic is adequately addressed within a single collaborative process.

It is recommended to present the collaboration question to colleagues and seek feedback on its clarity and specificity.

Need

Anticipated  
Product

Process  
Type

Collaboration  
Question

Partner  
Mapping

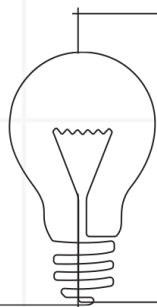
Identifying  
Landmines

Gantt Chart

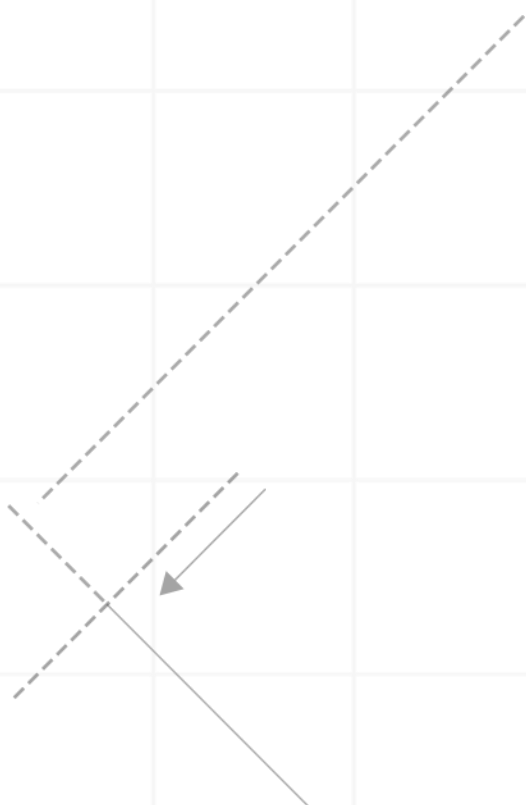
Planning  
Meetings

## The ideal collaboration question is...

- Based on a need
- Positive
- Focused and specific
- Indicative of the anticipated product
- Indicative of the type of collaboration



**Keep in mind:** The purpose of the collaborative process is to create a product that corresponds to the collaboration question.



## Examples of Collaboration Questions and Corresponding Products by Process Type

Process Type	Collaboration Question	Corresponding Product
 <b>Cooperating</b>	What should be included in the implementation mechanism for promoting digital work processes in educational institutions in the ultra-orthodox sector?	An implementation mechanism for promoting digital work processes in educational institutions in the ultra-orthodox sector
 <b>Cooperating</b>	What should be included in a joint operation model for optimal implementation of the Kdam-Atidim program?	A joint operation model for optimal implementation of the Kdam-Atidim program
 <b>Consulting</b>	What should be included in the new policy for approving the operation of kindergarten camps?	A policy document for approving the operation of kindergarten camps
 <b>Consulting</b>	What should be included in the professional development plan for promoting leadership skills among members of the ministry's psychological services?	A professional development plan for promoting leadership skills among members of the ministry's psychological services
 <b>Consulting</b>	What should be included in a recommendation report for gathering meaningful and insightful parent feedback on educational initiatives within district schools?	A recommendation report for gathering meaningful and insightful parent feedback on educational initiatives within district schools
 <b>Coordinating</b>	How will we identify and map disciplinary intervention actions in elementary schools, in order to develop suitable regulation mechanisms for them?	A model for identifying and mapping disciplinary intervention actions in elementary schools
 <b>Informing</b>	How should we publish the plan for assisting school administrators during their first year?	Publication of the plan for assisting school administrators during their first year

Need

Anticipated Product

Process Type

Collaboration Question

Partner Mapping

Identifying Landmines

Gantt Chart

Planning Meetings

## Important Questions to Ask

What will be the impact of the collaborative process on the issue at hand?

What are the limits of our mandate in leading the process? What can't we currently change?

What is the range of topics we will discuss as part of the collaborative process? What's outside the scope of discussion?

Is there a correlation between the collaboration question, the process type and the anticipated product?

What will be a sign that the process is moving in the right direction?

Need

Anticipated Product

Process Type

Collaboration Question

Partner Mapping

Identifying Landmines

Gantt Chart

Planning Meetings





## Partner Mapping

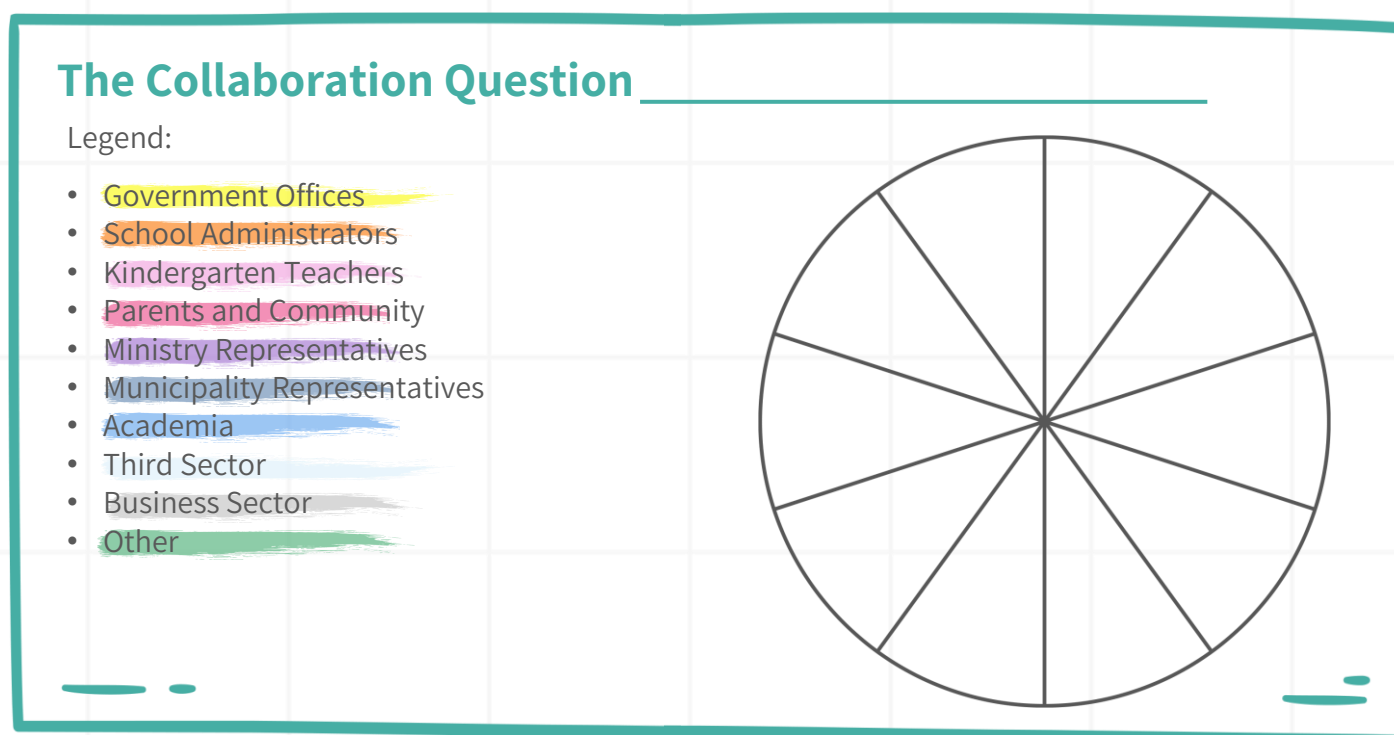
Mapping the partners is based on how relevant they are to the collaboration question. It is important to identify all relevant stakeholders who are interested in this matter. To get a broad picture and diverse opinions, we will strive to involve potential partners from different fields: community, parents, third sector, business sector, civil society, government offices, local authorities, academia and more.

Partner mapping is done according to different fields or associations, and each category is allocated a certain number of partners. Only after determining the desired number of participants will we write the names of potential partners.

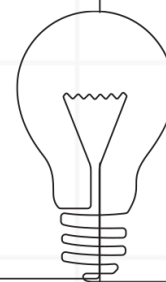
### Partner Mapping Tool

#### How to use the tool?

1. **Mark** the relevant sectors in the legend
2. **Shade** the chart slices according to the relevance of each sector to the issue, using the colors specified in the legend
3. **Translate** each colored slice into the desired number of partners



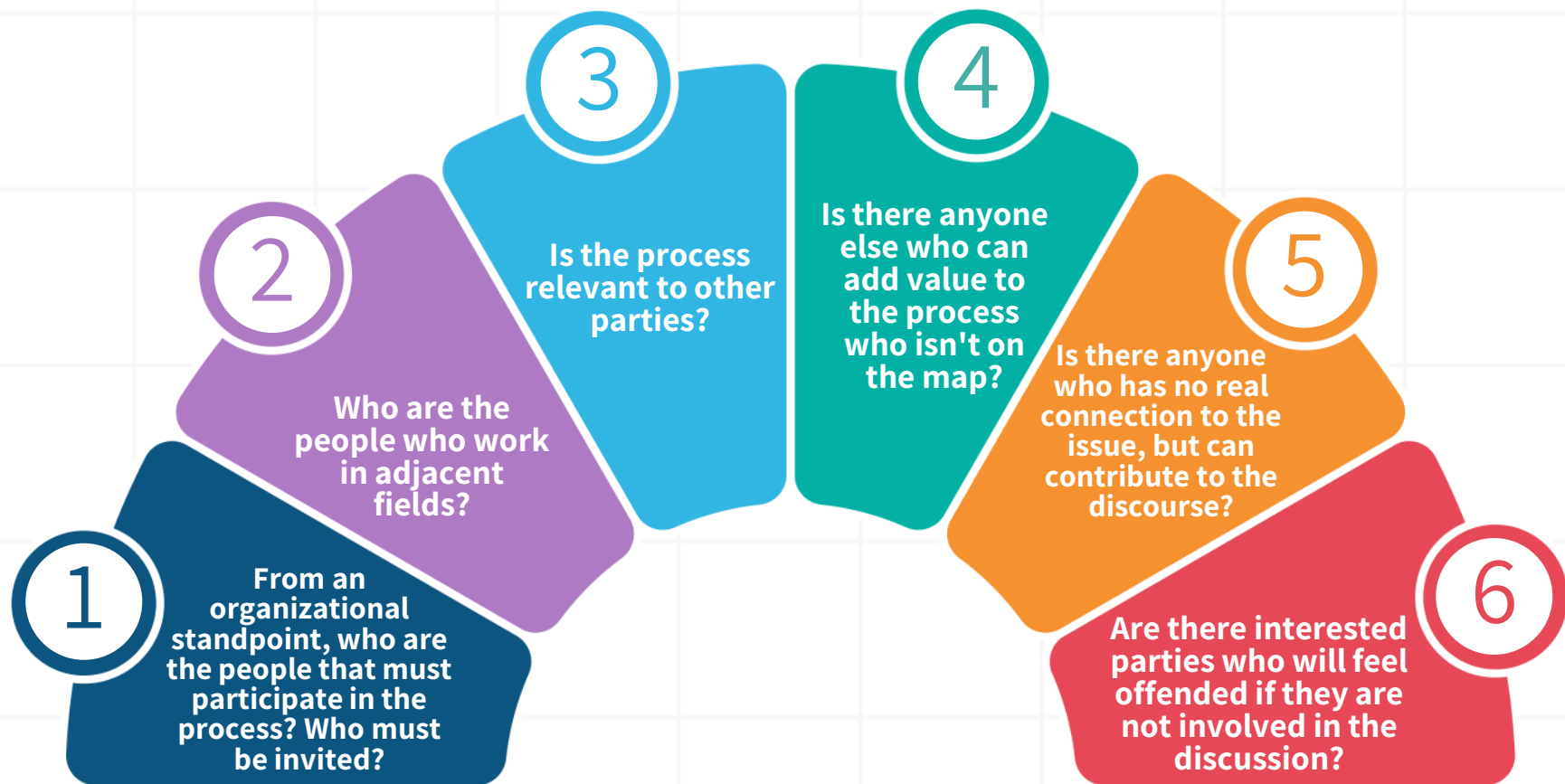
**Note:** When the collaborative process is of the cooperating type, it is common practice to publish a "call" and invite other community groups to participate in the process. Candidates are sorted according to predetermined criteria.



## Partner Mapping Guidelines

- ✓ Delaying the Selection Process - Instead of hastily choosing names, take the time to consider the principal stakeholders who should be involved in the process, based on the subject at hand
- ✓ Variety of Perspectives - Look for different perspectives in order to get a rich product
- ✓ Creative Thinking - Think outside the box, don't be afraid to step out of your comfort zone
- ✓ Relevant Roles - Examine the roles held by people addressing similar issues globally
- ✓ Diversity of Voices - Don't be afraid to invite opponents or people who think differently,
- ✓ embrace everyone and manage the dynamic so that other voices can also be brought into the process
- ✓ Number of Partners - A sensible number of partners that fits the process
- ✓ Quantitative Integration Between Academic Institutions, the Business Sector, and More - According to their relevance to the issue
- ✓ Diversity in Third Sector Organizations
- ✓ Involving Partners From Different Fields - To contribute new perspectives that have added value

## Important Questions to Ask



## Identifying Landmines

When leading the collaborative process, we may face landmines and challenges that could impede its progress. It's important that we prepare in advance for a possible encounter with potential landmines, so that we know how to deal with them in real time. Landmines usually stem from sensitivities related to the subject matter, the collaborative process itself, the participants, or their composition. Identifying a potential landmine won't necessarily help in neutralizing it, but preparedness helps in dealing with it.

In preparation for dealing with a potential landmine, we recommend envisioning possible scenarios, formulating appropriate responses to each scenario in advance, and examining potential outcomes.

### Common Landmines in Collaborative Processes and Strategies for Handling Them

Potential Landmine	Strategies
Disappointing Past Experiences with Failed Collaborative Processes - can lead to doubts about their efficiency and a lack of faith in their effectiveness	<ul style="list-style-type: none"> <li>○ Map previous processes</li> <li>○ At the beginning of the first meeting, acknowledge past failures with honor and respect, and encourage participants to embrace the new process with an open mind</li> <li>○ Outline the lessons learned from past failures and explain the changes implemented in the current process</li> <li>○ Highlight successful collaborative processes</li> </ul>
"Controversial" Topics - may lead to situations where different partners have conflicting opinions, each pulling in a different direction	<ul style="list-style-type: none"> <li>○ Lead a brief emotional release exercise</li> <li>○ Divide participants into groups so that those with opposing views are not in the same group</li> </ul>

		Need	Anticipated Product	Process Type	Collaboration Question	Partner Mapping	Identifying Landmines	Gantt Chart	Planning Meetings
Potential Landmine	Strategies								
Objections - expressions of anger, frustration and argumentativeness that may hinder the collaborative process	<ul style="list-style-type: none"> <li>○ Treat objections as a growth opportunity for the group</li> <li>○ Refrain from personal responses and strive to maintain a neutral stance</li> <li>○ Express empathy and understanding, while noting that the matter extends beyond the scope of the collaborative process</li> </ul>								
Sectoral/Cultural Differences Between Partners	<ul style="list-style-type: none"> <li>○ Prepare thoroughly and consider what not to say</li> <li>○ Sometimes it is better to conduct separate meetings</li> </ul>								
Media Sensitivity	<ul style="list-style-type: none"> <li>○ Formulate a collaboration question that will be as neutral as possible</li> </ul>								
Partners with Overlapping Roles	<ul style="list-style-type: none"> <li>○ Be careful not to "tread" into areas that might provoke conflict between the partners</li> </ul>								
Limited Time and/or Problematic Timing	<ul style="list-style-type: none"> <li>○ It is unwise to establish broad policy agreements during government/administration changes. In such cases, opting for a consulting process is recommended</li> <li>○ If time is limited, you might consider foregoing the process entirely as it requires a significant time investment</li> </ul>								



## Important Questions to Ask

1

Which partners have had positive or negative experiences with collaborative processes in the past?

2

Has anyone tried to address the issue and failed?

3

Does the process have to include certain people who oppose it?

4

What objections might we hear?

5

What opposing views might the partners express?

6

What might cause deviations from the subject or process?

7

How do we handle potential obstacles along the way?

Need

Anticipated  
Product

Process  
Type

Collaboration  
Question

Partner  
Mapping

Identifying  
Landmines

Gantt Chart

Planning  
Meetings



## Gantt Chart

The Gantt chart provides a clear timeline of the collaborative process, detailing all stages from beginning to end.

The Gantt chart includes:

- At the starting point: the invitation to engage with the collaboration question.
- In the middle: the dates and methods of each meeting in general (in-person or Zoom, discussion groups, etc.).
- At the end point: the estimated date for the publication of the product that corresponds to the collaboration question.

It is beneficial to prepare a visual Gantt chart with concise and accurate information, enabling partners to easily grasp the topic, understand when the process begins, how many sessions it will include and when it ends. The Gantt chart will help instill certainty and build trust.

We recommend conducting the first meeting in person to foster closeness and trust among participants.



## Planning the Collaborative Process - By Process Type

	Purpose	Anticipated Product	Collaboration Question	Number of Meetings
 <b>Informing</b>	Transferring information unilaterally	Publication and promotion of a particular topic	How and what to publish?	1
 <b>Coordinating</b>	Synchronizing between several parties or defining responsibilities	Document outlining consensus, partner mapping, and areas of responsibility	How to synchronize between...?	1-2
 <b>Consulting</b>	Consulting and examining a topic in depth before making a decision	Information gathering, recommendation report, responses to an existing draft	What should be included in...?	2-3
 <b>Cooperating</b>	Collaborating on leading and developing	Joint work plan, mechanism, model	Which product should we develop to support the implementation and assimilation of...?	3-5

Need

Anticipated Product

Process Type

Collaboration Question

Partner Mapping

Identifying Landmines

Gantt Chart

Planning Meetings





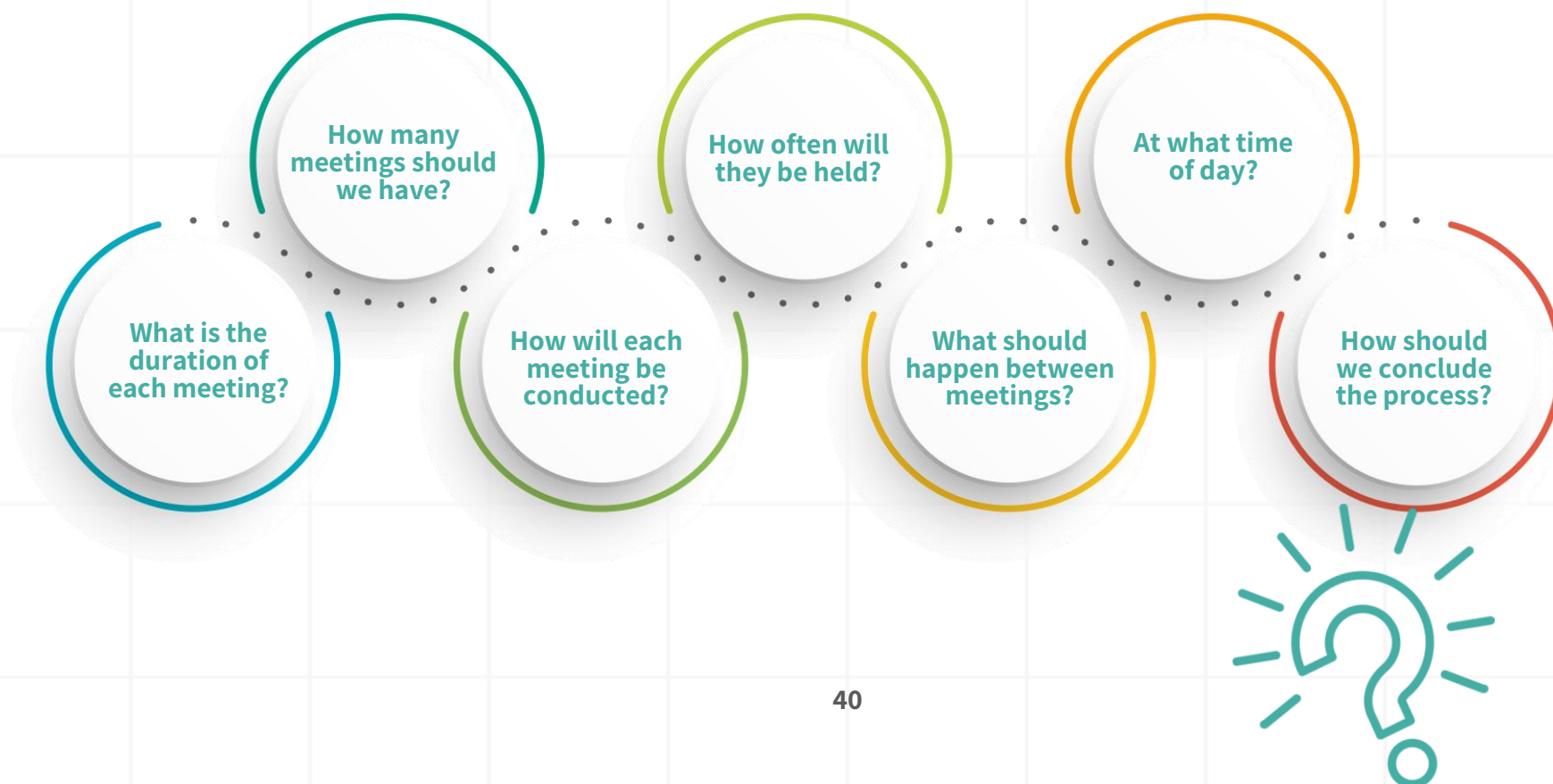
## Planning the Meetings

The final step in planning the collaborative process is planning the meetings. Each meeting's schedule must be structured and well prepared, in order to successfully develop the anticipated product within the set time frame. It's important to take into account the goals and outcomes of each meeting, and focus on the essential aspects, so as to respect the participants' valuable time.

In order to facilitate a collaborative thought process, and depending on the number of participants, plenary sessions and group work are typically held intermittently (except in informing processes). The group discussions throughout the process provide each partner with the opportunity to feel that they have a space and time to express their opinions and viewpoint, explore the raised issues, and actively participate in the discussion.



## Important Questions to Ask



The structure of collaboration meetings may vary depending on the type of process, but there are similarities between the components of the different processes, especially when it comes to coordinating, consulting or cooperating. **The opening** of these collaborative meetings is consistent: it always begins with a plenary session involving all the participants. At the first meeting, the process leader will present the purpose of the process and the anticipated product. At the beginning of subsequent meetings, they will update on the progress in product development.

The opening is actually the only part of the meeting in which the process leader directs all participants. Following this segment, it is advised for the process leader to intermittently join the groups solely as an observer. This approach enables the leader to engage with the discourse and gain insights prior to the discussions concerning the final product.

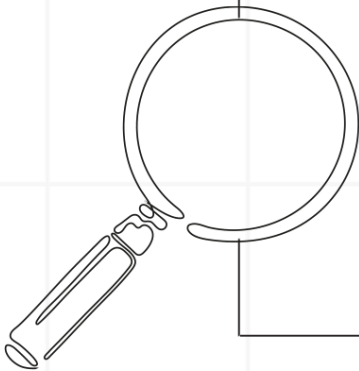
After the opening, the meeting usually transitions into group sessions, guided by the group leaders. The group sessions typically begin with a **team building opening activity**, which aims to "break the ice", deepen the connection and trust between the participants and help them transition into a learning mode. The opening activity may introduce a concept or idea that will be further developed later in the meeting, thus enhancing the meeting's overall cohesiveness.

After the opening activity, the meeting proceeds to the very heart of the process, with **each group focusing on a task that contributes to one component of the overall anticipated product**. The tasks and methods may vary, but the objective remains the same: **brainstorming** to generate diverse and innovative ideas. All meetings typically conclude with a closing activity, with the aim of reflecting on the proceedings of the meeting, in order to derive insights and future directions.

All ideas generated within the groups are collected at the end of the meeting, they are then developed and shaped into an intermediate product. This product is then presented to participants either at the next meeting if there is one, or via email.



In a cooperating process, we will resume a plenary session for product validation, in which participants will review draft-level products, assess their relevance and viability, provide feedback, and make adjustments as needed. After which, we will continue working in the task groups.



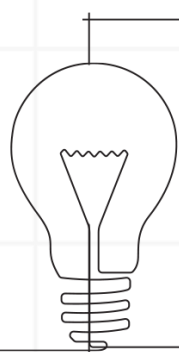
**Development** - Processing the ideas generated in the task groups into an intermediate product

**Validation** - Examining the intermediate product and offering corrections and feedback

The development and validation process will be repeated for every component of the product. Any further development of the intermediate product is part of a learning process, and any suggestions for improvement are implemented in the next validation process. In this manner, the product evolves and improves throughout the process.

The scope of the collaborative process therefore depends on the complexity of the anticipated product and the number of rounds of development and validation we undertake. It typically only requires a few iterations, so the process will span a few months at the most.

The length of sessions may vary, but the general rule of thumb is to keep meetings as concise and focused as possible to avoid wasting anyone's time. It's advisable to schedule meeting dates in advance to facilitate attendance for participants. We recommend holding the first and last meetings in person, while the rest can be conducted online for the convenience and accessibility of participants. Informing processes differ in this regard, as they typically involve only one meeting, preferably conducted online.

**Note:**

- ✓ We recommend preparing relevant visual aids for each meeting: accompanying presentation, printed materials for group work, etc.
- ✓ The recommended interval between sessions is no more than a month to ensure the continuity and efficiency of the process.



## Planning Meetings for Informing Processes

Informing is the simplest type of collaborative process, typically comprising a single short session lasting no longer than an hour. Due to the relatively low engagement required of the participants, it is recommended to hold the meeting online. The entire meeting will be conducted in plenary under the guidance of the process leader and, when necessary, in collaboration with other relevant professionals, without dividing into groups.

In this type of process, there is no need to develop a product as it is already prepared; the objective is simply to share it.

Nonetheless, it's important to provide an opportunity for feedback on the product after the meeting. Consequently, we will send a summary email containing the materials, relevant links, and occasionally a recording of the meeting. Participants will be invited to share their comments via email.



## Proposed Meeting Structure for Informing Processes

### 1st meeting



**Participants:** All participants



**Duration:** Up to 60 minutes

It is recommended to conduct an online meeting



### Course of Action:

- A. Presenting the background, purpose and policy relevant to the informing process
- B. Acknowledgements and invitation for responses via email

Email Validation

## Planning Meetings for Coordinating Processes

Coordinating processes typically require 1-2 sessions. The product of this collaborative process is a document outlining consensus, partner mapping, and areas of responsibility. The first meeting should be held in person, to allow the participants to get to know each other and to establish connection and trust. An additional meeting can be conducted either in person or online, depending on the level of coordination required. The first meeting will include one round of work in task groups, developing and validating the intermediate product, and a summary in plenary.

The task groups will review a proposal for a coordination map, which will outline the various parties involved and their respective activities, divided into categories. The brainstorming will focus on improving the existing document.

After the meeting, the product will be developed by a task team, composed of the process leader, the assistance team, the group leaders and other participants who choose to take part in it. The resulting product will be sent to all participants by email, with a validation request. All comments and suggestions for improving the document received via email will be compiled and implemented in the final document.

### Outline for Planning Meetings for Coordinating Processes

Below is a proposed outline of a coordinating process, assuming that the process consists of a single meeting. Additional meetings can be scheduled as needed, in accordance with the proposed outline, the complexity of the process and the importance of the final product.



## Proposed Meeting Structure for Coordinating Processes

### 1st meeting



**Participants:** All participants



**Duration:** Up to 4 hours

It is recommended to conduct an in-person meeting



### Course of Action:

**A.** Supervisor's blessing

**B.** Expectation management - process leader

**C.** Task groups

- Opening activity - introductions
- Brainstorming - examining a coordination map and suggesting improvements

**D.** Acknowledgements and summary in plenary

Task Team - Development



Email Validation





## Planning Meetings for Consulting Processes

Consulting meetings are similar in terms of structure to coordinating meetings, and usually include 2-3 sessions. The first meeting should be held in person, while the rest can be conducted in person or online. In consulting sessions, it is possible to incorporate an inspirational lecture, preferably from a different field, which will provide added value to the participants.

Following each consulting session, a task team will undertake development, followed by validation via email.

### Outline for Planning Meetings for Consulting Processes



#### Proposed Meeting Structure for Consulting Processes

##### 1st meeting



**Duration:** Up to 4 hours

It is recommended to conduct an in-person meeting



##### Course of Action:

- A. Supervisor's blessing
- B. Expectation management - process leader
- C. Inspirational lecture - guest speaker
- D. Task groups
  - Opening activity - introductions
  - Brainstorming - extracting insights and "golden advices"
  - Closing activity

**Task Team - Development**



**Email Validation**



## 2nd meeting



**Duration:** Up to 4 hours

It is recommended to conduct an online meeting



### Course of Action:

- A.** Presenting the intermediate product, organized into clusters
- B.** Task groups
  - Opening activity
  - Brainstorming - implementation suggestions
- C.** Acknowledgements and summary in plenary

**Task Team - Development**



**Email Validation**



## Planning Meetings for Cooperating Processes

Cooperating processes are the most complex collaborative processes, which is why they usually require a greater number of sessions - 3 to 5. It's advisable to hold the initial and final meetings in person. This allows participants to establish connections and build trust at the beginning of the process, and to present the products and celebrate the joint effort at the end. The rest of the meetings can be conducted either in person or online, as needed. Meetings in cooperating processes are typically longer, because more factors must be taken into account, and because the product requires a higher degree of agreement among the participants.

In contrast to other collaborative processes, in a cooperating process, **the final product undergoes validation during the last meeting, together with the participants.** This is because, in cooperating processes, participants play a significant role in the formation of the product.

### Outline for Planning Meetings for Cooperating Processes

Below is a proposed outline of a cooperating process, assuming that the process consists of three meetings. Additional meetings can be scheduled as needed, in accordance with the proposed outline, the complexity of the process and the importance of the final product.



### Proposed Meeting Structure for Cooperating Processes

#### 1st meeting

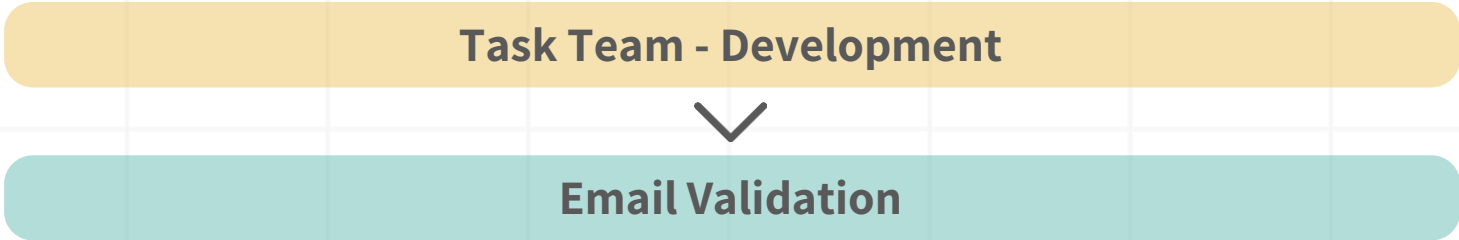


**Duration:** Up to 4 hours  
It is recommended to conduct an in-person meeting



**Course of Action:**

- A. Supervisor's blessing
- B. Expectation management - process leader
- C. Inspirational lecture - guest speaker
- D. Task groups
  - Opening activity - introductions
  - Brainstorming - extracting insights and "golden advices"
  - Closing activity



## 2nd meeting



**Duration:** Up to 4 hours

It is recommended to conduct an online meeting



### Course of Action:

**A.** Presenting the intermediate product, organized into clusters

**B.** Task groups

- Opening activity
- Brainstorming - implementation suggestions
- Closing activity

**Task Team - Development**



**Email Validation**

## 3rd meeting



**Duration:** Up to 4 hours

It is recommended to conduct an in-person meeting



### Course of Action:

**A.** Presenting the task groups' products

**B.** New task groups: Product validation, with an emphasis on implementation and distribution

**C.** Acknowledgements and summary in plenary

**Task Team - Development**



**Email Validation**

## How to Assemble the Task Groups?

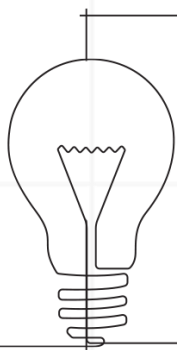
In the planning phase of coordinating, consulting, or cooperating processes, it's important to specify the composition of task groups and the topics that each group will discuss.

In terms of composition, it's essential for groups to be heterogeneous, enabling partners to hear diverse voices and develop products that reflect the breadth of perspectives. Frequently, when individuals hear other people's responses, they become less attached to their own initial viewpoints and are able to produce solutions that are more holistic and relevant.

To ensure diverse voices within each group, it's important to understand the backgrounds of the participants and their positions on the issue. Understanding the different needs and potential contributions of each participant will also facilitate more accurate responses within groups. For example, if one of the participants has a painful association with the issue at hand, it may be beneficial to select an experienced group leader who can handle it and manage the group's discourse respectfully. Additionally, this will enable us to assign experts in a particular field to the relevant task groups.

### **Suggestions:**

- Although the number of task groups depends on the complexity of the issue and the number of participants, it is generally recommended to create 2-3 task groups. This will simplify the process of consolidating the intermediate products into a unified final product.
- We advise against creating groups that are too large, as this can hinder the ability of each participant to voice their opinions and ideas.

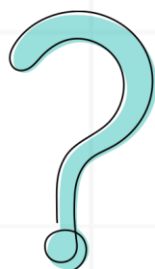


**Keep in mind:** Each group should be assigned a group leader who will facilitate discussions and assist in formulating insights. The group leader could be a member of the assistance team or another individual knowledgeable about the subject matter and experienced in this type of process.



## Important Questions to Ask

-  What are the essential topics under consideration?
-  What type of solutions would we like to develop for this issue?
-  What intermediate products will make up the anticipated final product?
-  Which division into subtopics will yield the best joint effort?
-  Do the task groups feature diverse representations? (Public, business, third sector, academia)
-  Are different sectors and parties evenly represented in the groups?



## Planning Collaborative Meetings

### Engagement Methods for Collaborative Meetings

Below are several methods for team-building opening activities, which can be utilized to facilitate task group work, conclude meetings, and validate the anticipated product (or its components). Different methods can be selected and even combined, depending on the characteristics of the groups and the requirements of the process. It's important to use varied methods to generate interest and increase participant engagement.

### Methods for Opening Activities

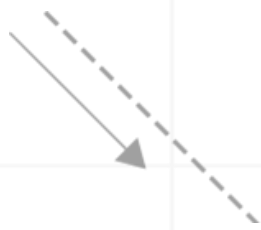
#### Picture Cards

1. **Invite** participants to choose a picture card that represents the emotions evoked by the issue or process, or their vision for our meetings.
2. **Share** in pairs or plenary.
3. **Gather** the diverse perspectives for use in the subsequent group discussions.

#### Sentence Completion Cards

Prepare cards with sentences to complete, such as:

- The most important thing about teamwork is...
- The most important outcome of this collaborative process is...
- I believe that collaborative processes are...
- If I could predict the outcome of the process, I would say that...
- We can learn from the successes in this field that...
- We can't avoid...



### Question Cards

Prepare cards with questions, such as:

- What is the quickest solution to this problem?
- What prices will we have to pay to reach a solution?
- What would we consider a success?
- How can we ensure that the product caters to different needs?
- What challenges do we face in our collaborative process, and how should we overcome them?
- What is my personal connection to this subject?

### Methods for Guiding Task Groups

We recommend using at least two methods during the group discussion, depending on the time and complexity of the question.

#### Silent Brainstorming, in pairs and in groups

1. Participants write down in silence: key insight, recommendation, challenge.
2. Each participant shares their central idea in pairs.
3. Each pair shares the most important idea raised during their conversation.
4. The ideas are written down on a board placed in the center of the table or on an online collaborative panel.

#### Consultation Protocol

1. The group leader presents the dilemma of the complex issue.
2. Participants write questions to help better understand the issue.
3. The group leader collects the questions into a pile.
4. Each participant takes their turn to select a card and answer the question. If necessary, the group leader and the other participants add to the statement.
5. At the end, participants share insights/thoughts that arose while listening to the other members.



### Shared Board

1. Place a large sheet of paper at the center of the table, containing the meeting topics derived from the collaboration question. Circle every topic.
2. Ask participants to write a response to the first subject on a single color sticky note and paste it within the circle.
3. Repeat for topics 2 and 3. Each subject is assigned a different color sticky note.
4. Examine the resulting board together, grouping common themes into one sticky note and referring to the ideas raised by others.

### Mind map

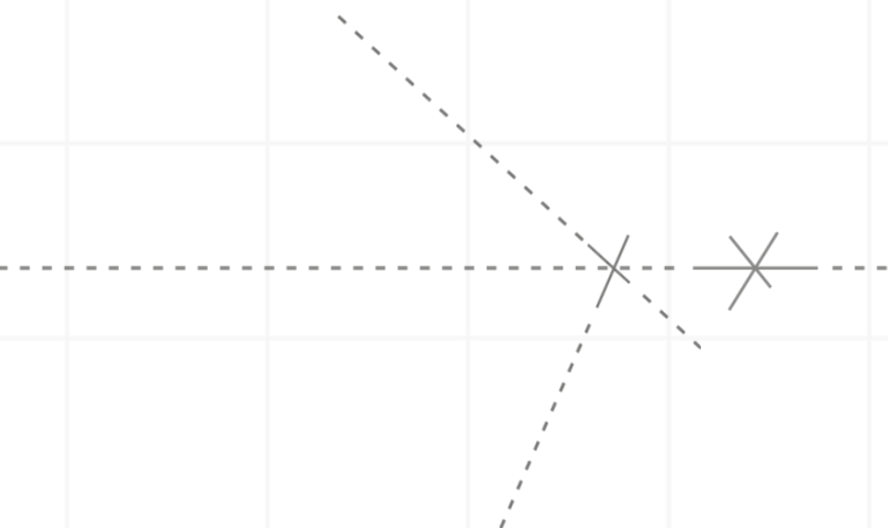
1. Write a central idea on a shared board (physical or online).
2. Each participant in turn adds an idea/concept/theme that connects to the central idea. It's important to include thoughts or ideas that emerge associatively.
3. Similarly, each participant adds an idea that connects to one of the ideas written in the previous round.
4. Continue writing ideas that build on previous ones until all ideas have been exhausted.
5. Examine the resulting branching chart and share insights.

### Insights and Practices Domino

1. Each participant receives an A4 sheet of paper, folds it in half, and opens it back up again.
2. Participants write an insight on one side and a practice on the other.
3. The first participant places their paper on the table and reads out their insight and practice.
4. A second participant says: "I connect to the practice/insight of..." and adds their paper next to the previous participant's insight or practice, like in a domino game.
5. Repeat the process until a domino track of linked ideas is formed on the table.

## Methods for Closing Activities

1. A-Z - Ask participants to say a word or a sentence that summarizes the experience we had in the group in alphabetical order. The first says a word/sentence that begins with the letter A, the second says a word/sentence that begins with the letter B, and so forth.
2. Drawing - what have I gained today?
3. Select an object or an image that represents an insight gained during the session.
4. Round of Gratitude - complete the sentence: "I want to thank... for teaching me..."



# Chapter 3: The Leading Phase



# Leading the Collaborative Process

## Preparing for the First Meeting

### **Preliminary Discussions and Invitations**

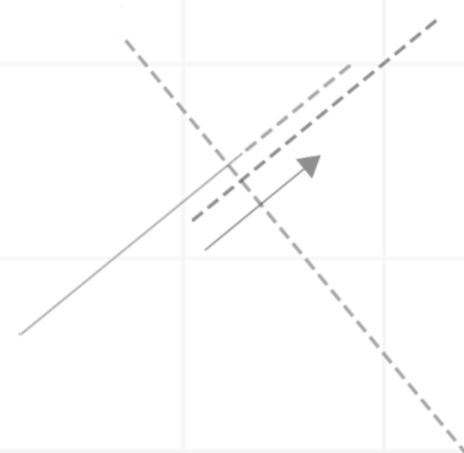
The first step in leading a collaborative process is to contact the participants and/or the participants' superiors to secure their approval and support for commencing the project. In this conversation, we aim to provide an overview of the process background, outline the collaboration question, and define the anticipated product. Additionally, we'll discuss the participants' role in the process, including their required involvement and commitment, as well as informing them of the meeting dates.

Once we've received the green light, we can send invitations to the participants. These invitations are designed to engage them and communicate the potential value this process holds for them. From the invitation, recipients should understand why the process is relevant to them, why they should participate and what they can and are expected to contribute. It should provide clarity regarding the direction of the process, what they can expect to encounter along the way, the type of collaboration and the scope of the discussion. We recommend managing the participants' expectations right from the start; therefore, the invitation should include a brief overview of the elements defined in the planning phase: the identified need, the anticipated product, the collaboration question, and the Gantt chart. Clear communication about the process and its intended outcomes increases trust and reduces the likelihood of future crises stemming from discrepancies between participants' expectations and the actual process.

A well-crafted invitation communicates that its author understands the process they are leading, while also expressing genuine interest in listening to everyone invited to participate.

The invitation must also be respectful and attractive from a design standpoint.

The invitation can also include supporting materials, such as articles, research findings, presentations, survey results, or any other relevant document that provides context and additional information. Sometimes an initial position questionnaire or survey is sent with the invitation. This information could help us in forming heterogeneous task groups. In cooperating processes, as each group discusses different topics, it's beneficial to include these topics in the invitation as well. This allows participants to choose which group they would like to join.





## Creating the Setting

Another step to take before the first meeting, typically held in person, is to create an inviting setting. The setting is essential, as the environment in which the meeting takes place can significantly impact the engagement, creativity and overall experience of the participants. A pleasant environment contributes to a positive atmosphere that encourages active participation and open communication. Moreover, a pleasant environment conveys professionalism and respect to participants.





## Suggestions for Creating an Inviting Setting

- **Location:** An accessible venue, reachable by public transportation, with nearby parking facilities
- **Lighting:** A bright environment, with windows
- **Comfortable Seating:** Comfortable chairs and seating arrangement that allows for easy interaction and visibility among all participants
- **Quiet:** Ensure there are no background noises or distractions
- **Refreshments:** Provide a variety of refreshments that accommodate different dietary preferences and restrictions
- **Personal Attention:** Welcome cards, name tags, personal assignments hidden under the chairs, greetings, etc.





## Checklist - Actions to Take Before the First Meeting

 Action	 When?	 Done?
Talk to the partners and/or their superiors, describe the process and its objectives	1 month before the first meeting	<input type="checkbox"/>
Schedule a venue for the meeting	1 month before the first meeting	<input type="checkbox"/>
Send a detailed invitation for the first meeting and notices for subsequent meetings (schedule meetings 3-4 months in advance to allow group members ample time for preparation and attendance)	1 month before the first meeting	<input type="checkbox"/>
*In cooperating processes, the invitation can include the group topics, allowing participants to choose a topic in which they can contribute based on their knowledge and abilities (providing two options for flexibility in placement)		
Invite the supervisor to speak at the beginning of the first meeting (or record their blessing)	1 month before the first meeting	<input type="checkbox"/>
Create a contact list comprising all partners solely for the purpose of making announcements (restricted group) and 2-3 WhatsApp groups for the task groups	1-2 weeks before the first meeting	<input type="checkbox"/>
Ensure all meeting materials are ready: presentations, memos, copies of reports, group work materials, etc.	1-2 weeks before each meeting	<input type="checkbox"/>
Send a reminder email	3-5 days before each meeting	<input type="checkbox"/>
Final logistical preparations: reminder and coordination with the meeting venue, tablecloths, refreshments, presentation, printing materials, name tags with group-colored stickers for each participant	1-2 days before each meeting	<input type="checkbox"/>

During Meetings

After Meetings

Concluding the  
Process

The Finish Line



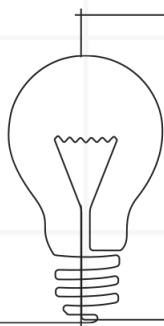
## During Meetings



### Managing Expectations with Participants

At the beginning of the first meeting, the process leader starts by describing the issue at hand and explaining the purpose of the process, the anticipated product, the collaboration question and the type of collaborative process. The clearer we are about the anticipated product and its components, the more focused the process will be. It's important to emphasize our **focus on results** as we enter the process - our goal is to emerge with a collaborative product. This will minimize misunderstandings and deviations from the subject and focus the attention and efforts of the participants on the desired outcomes.

It is important to provide participants with a clear framework for how the meeting (or series of meetings) will be conducted, so that they know what to expect: the ideas raised in the task groups will be collected and developed after the meeting, and the resulting product will be returned to the participants for validation.



**Note:** Adhere to the scheduled start and end times of meetings; this demonstrates respect for participants' time.





## What Should Be Addressed When Managing Expectations?

- Content - What is the central issue and what topics will be discussed?
- Structure - How will the process be conducted, including the number, format and schedule of meetings?
- Type - Is the purpose of the process to inform, consult, coordinate or cooperate?
- Scope - Do we invite partners to listen, discuss an existing document or promote optimal policy implementation?
- Anticipated Product - Treaty? Action plan? Strategy mind map?
- Limitations - **A collaborative process is not a decision-making process**; rather, it involves learning from our partners' knowledge and considering their perspectives. It is important to communicate to partners that their input will be taken into account when making the final decision. Additionally, if certain aspects have already been decided, it's important to specify this in advance.

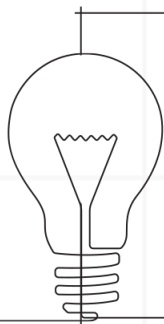


## Instructing Task Groups

The task groups are instructed not by the process leader, but by the group leaders they appointed. One of the most important roles of the group leader is to make sure the team is **focused on the task at hand**. Hence, the first step in instructing the task groups involves presenting the collaboration question, which aims to focus participants on the purpose and desired outcomes of the process.

The objective of group work is to obtain participants' different perspectives on the collaboration question, with a focus on practical solutions. In essence, the primary focus within the groups will be to generate a diverse range of **implementation suggestions that address the collaboration question**.

The task groups - aptly named - are designed to carry out a specific and clear task. Whether the task is performed independently, in pairs, or as a group, it's important to provide participants with clear instructions and request they adhere to them throughout the session to maintain focus on the subject matter.



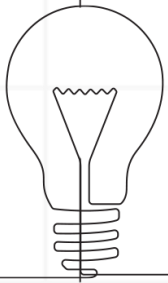
**Participants should remain in the same task groups throughout the process to facilitate the deep exploration and development of their team's subject.**

**We recommend opening a WhatsApp group for each task group, in which the intermediate products will be sent for validation, if necessary.**

In consulting and cooperating processes, we can **direct and concentrate on the task using a collaborative visual tool**, such as a large sheet of paper placed at the center of the table or a collaborative board with relevant titles (like 'Insights on the Issue' and 'Recommendations for Implementation'). This sort of facilitation tool not only helps focus the conversation during the meeting but also aids in developing the collected ideas afterward. The more structured the tool, the easier it will be to develop the ideas that emerged. The tool should be customized to suit the anticipated product, so that the group's brainstorming addresses its various components. In a coordinating process, unlike consulting and cooperating processes, the focus of brainstorming sessions will be on the proposed anticipated product, namely a coordination map, which participants will evaluate and respond to.

The group leader should encourage discussion among group members using various methods, ensuring that each individual can present their position and hear the perspectives of others. The leader should balance quieter and more dominant voices within the group to ensure discussions remain focused and relevant to the agenda.

We recommend using thought-provoking questions to encourage participants to explore both their own ideas and those of others. The leader should ask questions that prompt participants to contemplate different viewpoints, explore necessary compromises, and examine both intended and unintended consequences of the diverse **implementation proposals** discussed.



**There's no need to reach agreements in group work; it suffices for each participant to express their position, and to document said positions. It's essential to fully listen to participants without invalidating their statements, even if their suggestions are complex or challenging to implement. Honest and in-depth listening fosters an environment where people feel comfortable expressing their thoughts and contributing to the process.**



## Questions to Ask in a Task Group in the Leading Phase:

### Questions That Connect the Subject and the Participants

- In what way is the subject relevant to you?
- In your opinion, what should/should not happen?
- How might your idea/suggestion affect others?

### Questions About the Impact of the Process

- What may be the implications of this idea?
- What is the possible cost of this approach?
- What needs to happen to achieve the best possible outcome?

### Inquiry Questions

- How do the different elements conflict with each other?
- If we were to ask someone who opposes this idea, what would they say?
- What milestones will indicate that we are on the right path?

### Questions Regarding the Discussion Itself

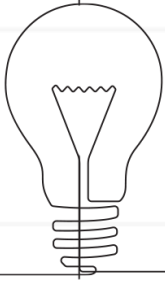
- Did the discussion make you reconsider your perspective?
- What have we yet to consider regarding this issue?
- How do we take our next step?

At the end of the group work, it's important to reassure participants that all their contributions will be collected and synthesized into a product, with the aim of reflecting everyone's perspectives as comprehensively as possible.

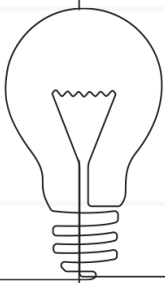
During group work, the process leader assumes the role of an observer, taking notes for themselves. The process leader undoubtedly has extensive knowledge regarding the collaboration question and how to address it. However, it is important that they not respond to the discussion, even if it conflicts with their point of view. This way, participants will feel more at ease sharing ideas, leading to the development of a more meaningful product.

### Key Points to Emphasize to Group Members:

- Focus on the instructions and on the task
- Take into account that sometimes the group leader will have to interrupt participants in order to move on to the next step
- Allow everyone the opportunity to speak to ensure that all voices are heard while also maintaining the schedule
- Avoid judgment and criticism - there is no one truth, allow different opinions
- After the meeting, the task team reviews and refines the ideas presented, ensuring that we come to the next meeting better prepared



During group work, the process leader rotates among different groups, listening attentively and taking notes. It's important that they refrain from expressing personal opinions or interfering in the discussion in any way.



### Suggestions for Instructing Task Groups:

1. **Focused and Clear Task:** Engage participants in a well-defined task.
2. **Inclusive Environment:** Promote open-mindedness and respect for diverse points of view.
3. **Creative Thinking:** Offer unique solutions to challenges.
4. **Constructive Feedback:** Encourage positive discourse and constructive criticism, while avoiding judgement.



## Online Task Group Guidance Highlights

1. **Prepare to resolve technical issues**, such as audio or video issues, and have a backup plan ready in case there are disruptions to the selected platform.
2. Divide participants into virtual rooms **to make sure everyone has a chance to speak**.
3. **Increase engagement by asking questions**, incorporating **visual content** (video and images), introducing **gameplay** (such as guessing answers within time limits, scoring participants, role-playing), etc.



## How to Encourage Innovation in Task Groups?

- ✓ **Diversity of Participants** - Varied backgrounds, experiences and areas of expertise.
- ✓ **Discourse on Innovation** - Incorporating a video or quote regarding innovation as a basis for discussion.
- ✓ **Encouraging Innovation** - Praising participants who contribute innovative ideas to motivate others to do the same.
- ✓ **Establishing a Defined Process** - When the structure is clear, it is easier to "run wild" with new ideas.
- ✓ **Time for Personal Reflection** - Allocating time for participants to contemplate their insights and challenges can lead to deeper understanding and innovative breakthroughs.

## Presenting Progress Made Toward the Anticipated Product

In the leading phase, one of the process leader's key responsibilities is to update on the product's development. Creating a sense of progress among participants is essential, as it can boost motivation and engagement, and emphasize **the value and contribution of the joint effort**. The progress reflects the collective effort and serves as evidence of improving teamwork. It emphasizes the notion that the process's success relies on the inclusion of diverse positions and perspectives.

The process leader presents the progress in the different stages and the different types of processes. When the process spans multiple sessions, starting from the second session onwards (except in informing processes), progress updates are typically delivered **at the beginning of each session**.

To make progress visible, we'll develop participants' ideas into a **visual product** (presentation, table, infographic, etc.). We will elaborate on the creation of an intermediate product that demonstrates progress in the Development section. Regarding the presentation of the product, please keep in mind our goal of progressively improving its quality, akin to adding a new floor to our building with each meeting.

It's essential to ensure that all discussions within the group are accurately portrayed in the presentation of the intermediate product. If possible, we recommend demonstrating to participants how their ideas are incorporated into the product, even quoting their exact words. This practice enhances participants' sense of being heard and valued, emphasizing the significance of their input. Following the presentation of the intermediate product, participants should be encouraged to send validation notes.

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## Why Should We Reflect to Participants the Progress in Product Development?



**Clarity and Direction:** Progress updates aid in understanding our current position relative to the anticipated product and ensure that we stay on track.



**Transparency:** Progress updates reflect the considerations involved in developing the product, and how it expresses the participants' ideas.



**Motivation:** Tangible progress can increase participants' enthusiasm, seeing their efforts yielding actual results.



**Product Improvement:** During the presentation of the product, participants may identify areas for enhancement and propose new ideas and solutions that have not been previously discussed.



**Responsibility:** When participants realize that their ideas are being developed into a product, they feel a greater responsibility and commitment to its implementation.





## Documenting Collaborative Meetings

By documenting the various perspectives voiced during collaboration sessions, we can reliably reference the issues and ideas discussed. Documenting cultivates a culture of accountability and professionalism, prevents ideas from falling through the cracks, and enables us to build upon these ideas during the development stage.

We recommend appointing each group a note-taker, who will be responsible for documenting the meetings. It's also advisable to film or record work processes and products (with participants' consent obtained beforehand). The tool below can be used in documenting the collaboration sessions.



## Tool for Documenting Collaborative Process Meetings

**The general atmosphere at the meeting:** \_\_\_\_\_

**The topics most discussed by the group:** \_\_\_\_\_

**Important quotes:** \_\_\_\_\_

**Decisions made at the meeting:** \_\_\_\_\_

**Tasks assigned:** \_\_\_\_\_

**Questions raised:** \_\_\_\_\_

**An exciting occurrence at the meeting:** \_\_\_\_\_

**Matters requiring communication to the assistance team, superiors, and other relevant parties:** \_\_\_\_\_



## After Meetings

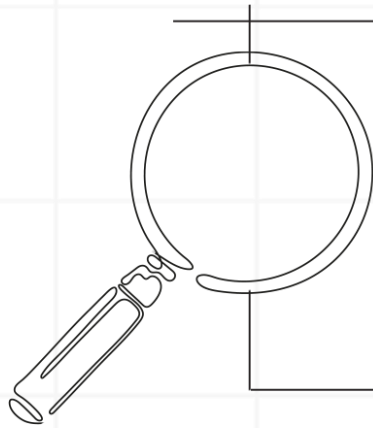
### Product Development

At the conclusion of each collaboration session - except for informing sessions - whether it's a standalone meeting or part of a series, we will have a collection of ideas that we aim to develop into an actual product. The development will be carried out by a task team, comprised of the process leader, the assistance team, the group leaders and other participants. With the task team's help, we will gather all the ideas generated in the groups, categorize and organize them to clarify the main issues discussed. The development will be much easier if the groups have a structured facilitation tool that is pre-categorized.

In order to make sure that there is a correlation between the emerging product and the anticipated product defined during the planning phase, it's crucial to continually revisit the collaboration question. The question will help in focusing and assessing the relevance of the different ideas.

### How to develop a collection of ideas into an actual product using **clustering**:

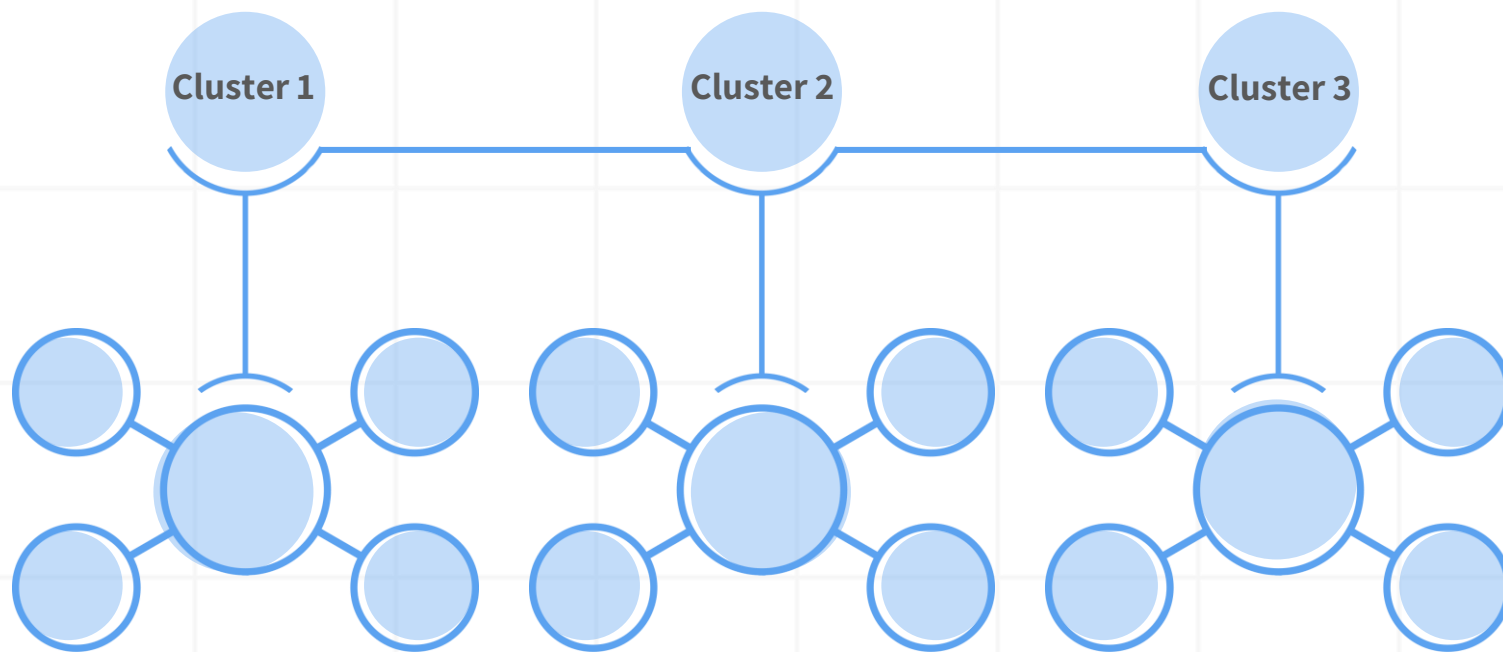
1. Collect all the group contributions, type them up and send them to the task team for a first impression.
2. Display the **collaboration question** prominently in a visible location.
3. Color-code **repeated and similar ideas**, then organize them into clusters (subject groups).
4. Mark **keywords** in each cluster.
5. Determine the **main idea** of each cluster.
6. Give a **title to each cluster** (e.g. challenges/opportunities, partners/actions, mechanism components/modes of operation).
7. Make **a cluster diagram**.



**Clustering** - grouping objects based on their similarities, where objects within the same cluster are more similar to each other than to those in other clusters.

## Example of a Cluster Diagram

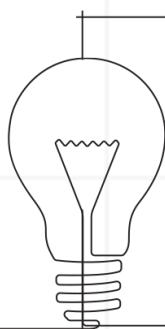
Collaboration Question



**How will we know if the clusters we created serve the process?** We'll ask both ourselves and the task team whether the clusters are effectively guiding us toward answering the collaboration question. Alternatively, we can assess the relevance of the clusters to the final product by examining the degree to which the cluster titles coincide with the components of the anticipated product. Throughout all stages of development, our aim is to advance further toward the anticipated product.

It's important to explain the cluster groups and the rationale behind their selected titles during the product's progress presentation.

The development between group meetings is crucial, as it gives participants a sense of progress and value. In addition, as a result of the development stage, we can consider additional perspectives on previously raised ideas, thereby contributing to more accurate decision-making.



**Very important:** Do not disregard any voices heard during the process; ensure that they are all represented in the emerging product. If disagreements arise, it is possible to include a note in the product indicating that there were some reservations.

## Product Validation

Following each development process, there is a validation phase where participants are asked to provide feedback and comments on the product. The purpose of validation is to ensure that everyone is informed of and in agreement with the collaborative product. This increases participants' confidence in the process and deepens their connection to the product. Validation is usually carried out by email (except in cooperating processes, where validation is done at the last meeting).

We recommend assigning a dedicated email address for participants' responses regarding product validation, ensuring that no messages are missed. When receiving a validation email from one of the participants, it's important to thank the sender and state that their response will be taken into account.

## Key Points in Product Validation



### Relevance to the Collaborative Process:

- To what extent does the document answer the collaboration question?
- Are the ideas relevant in practice?
- How does this document help our progress?



### Implementation:

- To what extent are the ideas in the document feasible?
- What challenges do we foresee during the implementation phase?
- Who else can help with optimal implementation?



### Clarity and Structure:

- Is the overall structure of the document clear and easy to follow?
- Are the titles, subtitles, and sections organized logically?
- Are the explanations clear and understandable?



### Accuracy:

Are the facts, data and information presented in the document accurate?

Is there any critical information missing?

Are there factual errors or inaccuracies?

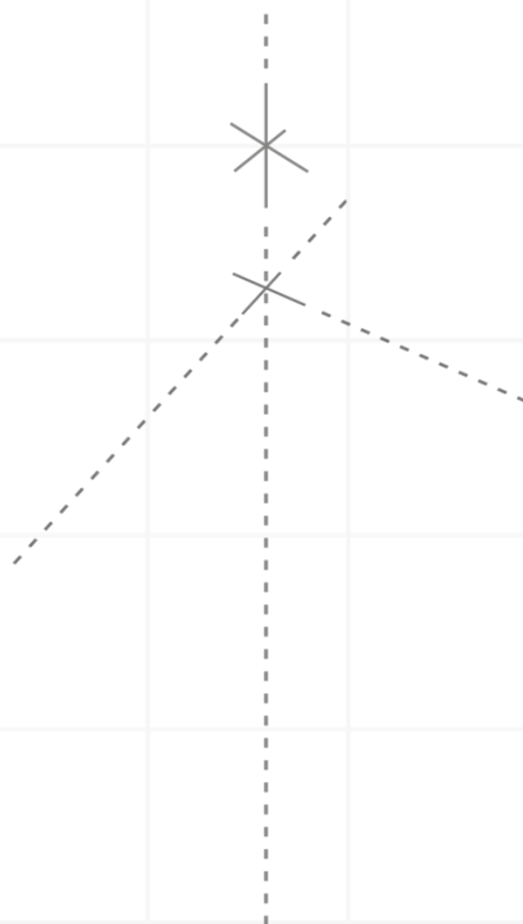


### Graphics:

Does the design enhance comprehension?

Do visual aids, charts or graphs effectively support the content?

How do its appearance and visual components improve the document?





## Meeting Summary

When the collaborative process consists of more than one meeting, a few days after each meeting, and up to a week at most, we will send participants an email with a summary of the meeting, along with the developed product. The summary will provide a clear and concise overview of the meeting, establishing a common ground and equal starting point for all participants. It enables participants to build upon the discussions and developed product from the previous meeting during the next one, minimizing the risk of misunderstandings or misinterpretations. Additionally, it provides an opportunity for those who were unable to attend the meeting to stay informed and catch up with the progress. We will always conclude by inviting participants to reach out with any comments or questions, maintaining an open channel of communication. It's also important to clarify in the summary that while we value all contributions, we may not implement every suggestion. Instead, the ideas discussed will serve as the foundation for future work.

Development

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## Meeting Summary Format

The meeting took place on the date \_\_\_\_\_ at the address \_\_\_\_\_

The purpose of the collaborative process is (add the collaboration question)  
\_\_\_\_\_

toward the creation of (add the anticipated product)  
\_\_\_\_\_

This collaborative meeting is \_\_\_\_\_ of \_\_\_\_\_ meetings planned for promoting the topic and creating the final product.

The meeting began with \_\_\_\_\_

We then moved on to \_\_\_\_\_

And we finally concluded with \_\_\_\_\_

The extensive and valuable knowledge shared during the meeting has been collected and will serve as a basis for further discussion as preparation for writing \_\_\_\_\_  
(add the anticipated product).

All the ideas generated during the meeting have been compiled into a first draft, categorized by topics (see Appendix 2)

### **Attachments:**

**Appendix 1** - Key Insights From the Discussion

**Appendix 2** - Intermediate Product After Development

**Appendix 3** - Attendee List

We invite you to review the materials and respond via email with any feedback, additional input, or concerns about accuracy.

Sincerely,

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## Checklist - Actions to Take After Meetings

 Action	 When?	 Done?
Collecting the ideas generated in the meeting and typing them up	1 month before the first meeting	<input type="checkbox"/>
Sending an email to participants based on the comments made during the session. The email will include: brief summary, acknowledgements, next meeting date, assigned tasks, materials, opening for responses/comments, etc.	1 month before the first meeting	<input type="checkbox"/>
Developing the insights and ideas generated in the meeting with the task team - sorting into clusters, choosing a clear way to present them at the beginning of the next meeting	1 month before the first meeting	<input type="checkbox"/>
Sending the intermediate product to all participants for validation	1 month before the first meeting	<input type="checkbox"/>
Revising the intermediate product based on the received responses	1-2 weeks before the first meeting	<input type="checkbox"/>
Preparing materials for the next meeting - including adjustments if necessary	1-2 weeks before each meeting	<input type="checkbox"/>

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Closure and  
Acknowledg  
ments



## The Closure Meeting



### Concluding the Process

It's essential that we create a sense of closure to the collaborative process, as it acknowledges the effort invested and fosters a feeling of value among the participants. In addition, proper closure creates a smooth transition to the product distribution phase and an outline for future collaborations.

The closure meeting should have a festive atmosphere, where we express gratitude and appreciation to everyone for their contribution to the process and its results. In most cases, we will present the final product and demonstrate how the various ideas generated throughout the process come together to form a cohesive and comprehensive picture. It is a public and mutual recognition of the unique value that each participant brings to the table.

At the end of the meeting, we will describe how we intend to use the collected knowledge, what the product will be used for, and where it will be published. In addition, we will explain that the product will undergo another development round and be sent to the participants for validation.

We will, of course, conclude with acknowledgements to the participants, thanking them both as individuals and as a collective for their time and participation in the process.

Preparing for the First Meeting

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Closure and Acknowledgments



## What Will Be Included in a Collaborative Process Closure Meeting?

- ✓ **Summarizing Major Achievements:** Milestones reached throughout the process.
- ✓ **Presenting the Product:** Emphasizing the inclusion of every voice.
- ✓ **Recognizing Participants' Contribution:** Providing specific examples of how their ideas positively influenced the outcome of the process.
- ✓ **Acknowledgements:** Extending gratitude and appreciation for everyone's commitment, time, and dedication throughout the entire process and for the collective effort that resulted in success.
- ✓ **Looking to the Future:** Exploring how the product will be used, outlining the next steps, and identifying the opportunities it presents.

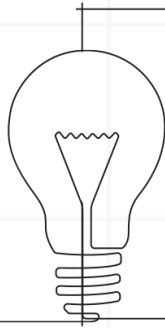


## Presenting and Validating the Finished Product

In some of the collaborative processes, and especially in cooperating processes, the final product is presented at the last meeting. The presentation of the product must be meticulously prepared to effectively communicate the central ideas, particularly how the product addresses the initial need. It's important that all participants see their input reflected in the product; therefore, it is worthwhile to elaborate on how the product embodies the diverse voices involved.

In a cooperating process, where each group tackles a different topic, it's recommended for group leaders or representatives to present the products developed by their respective groups. Participants will then be divided into new groups to gain exposure to additional perspectives. Within these new groups, they will discuss the presented products and suggest improvements. This preparation enables the process leader to focus on presenting the synthesis of all the products into a unified final product.

When validating the final product, our goal is to assess its applicability and devise distribution strategies. In order to recruit participants as ambassadors for distribution and implementation in the field, we will ask questions concerning optimal implementation: What are the next steps? What aspects should be taken into account? Which parts would be easier to implement? What are the challenges and opportunities in distribution and implementation? Participants should be encouraged to propose methods for distribution and publication during the closure meeting. We can then map their proposals according to various demographics and broaden the product's impact by distributing it to diverse audiences with widespread circulation.



**This is not a generic product, but rather a valuable tool.  
We would like to distribute and implement it  
systematically.**



### **Suggestions for Presenting the Finished Product**

- 1. Surprise:** Start with a surprising fact or figure related to the collaborative process or its results.
- 2. Variety in Presentation Methods:** Present the product through a series of images, illustrations, songs, etc.
- 3. Vision of the Future:** Envision the impact of our product three years from now, describing the positive outcomes it will bring.

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Acknowledg-  
ments



## The Finish Line



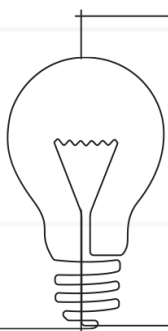
### Producing and Distributing the Product

The collaborative process doesn't conclude with the final meeting, but rather with a closure letter sent to all participants.

To produce the final product, we recommend using graphic design services and incorporating data visualizations. Note that the product will include an acknowledgements chapter with the names of all the partners involved in the process. This is because our product will primarily serve our partners in their organizational/field activities.

In the closure letter, we should also outline the future plans for the product. It can be noted that the insights and suggestions in the document will be presented as part of further discussions and meetings to advance the issue and/or formulate a document of recommendations and actionable steps. These will be subsequently integrated into the work plans of the relevant departments/bureaus.

After sending it to participants, we will continue to distribute the product as widely as possible through various communication channels and within other frameworks.



**If, at the conclusion of the collaborative process, the product remains incomplete and requires further examination, we will not extend or expand the current process. Instead, we will initiate a new collaborative process.**

Preparing for the  
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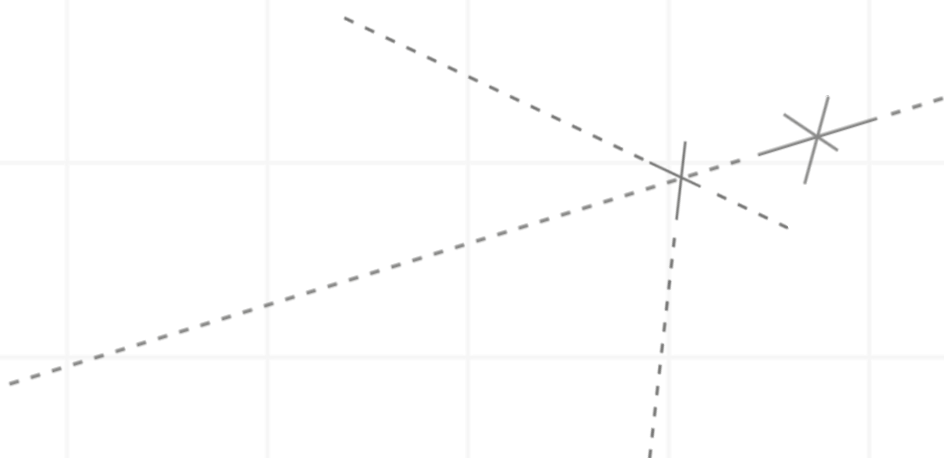
Producing  
the  
Product

The Finish Line



## Online Feedback and Lessons Learned

In the closure letter, we advise including a link to an online feedback form. This will provide an opportunity to gather insights on both successful aspects and areas for improvement, allowing us to draw valuable lessons from the process. We recommend including up to 5 questions in each questionnaire. After collecting the feedback responses, it's beneficial to conduct a lesson-learning session with the involvement of the process leader and the assistance team. This session aims to improve future collaborative processes based on the insights gained.



## Examples of Feedback Questions Concerning the Collaborative Process

To what extent do you agree with the following statements?

Extent:	Strongly Agree			Strongly Disagree		
My voice was heard in the discussion	6	5	4	3	2	1
The final product reflects the diverse perspectives that were raised during the discourse	6	5	4	3	2	1
The process proved valuable to me	6	5	4	3	2	1
I became better acquainted with the partners and made new connections	6	5	4	3	2	1
The final product is relevant and applicable	6	5	4	3	2	1
	6	5	4	3	2	1

Additional comments: \_\_\_\_\_



## Keys to Success



### **One Leader Per Process**

In order for the collaborative process to achieve its goals, it is important that the process leader be the sole conductor of the orchestra - a single leader in charge of planning and leading the process in all its aspects. While the leader should consult with the assistance team and be willing to listen to others, the more they take the lead in making decisions about the collaborative process and its outcomes, the higher the likelihood of success in producing and implementing the product.



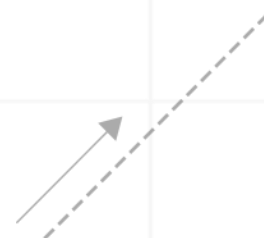
### **Thorough Planning**

The leader of the collaborative process is like an architect; they must meticulously plan the construction, floor by floor, without skipping any steps, lest the building collapse. Thorough planning forms the foundation for the success of the process, encompassing a deeper understanding of the need, outlining the process, anticipating potential challenges, and defining a specific product. Insufficient planning may result in the process concluding without a product, leading to a sense of missed opportunity and wasted time.



### **Executive Level Backing and Involvement**

The preliminary dialogue conducted by the process leader with their executive level greatly influences the execution and outcomes of the process. The decision to embark on a collaborative process must receive approval and support from the supervisor; without it, the process cannot commence. It's important to discuss in advance the purpose of the initiative and the anticipated product, as the executive level will play a role in the subsequent distribution and implementation of the product. The degree of involvement of the executive level in the process may vary, but their agreement is essential, so that they would promote the product to other departments and stakeholders, thereby amplifying its impact.







### **Assistance Team Supervision and Support**

The assistance team plays a key role in supporting the process leader during both the planning and leading phases.

Those 2-3 people selected by the process leader help in various ways to improve the process and ensure its success. They offer support, aid in navigating difficult decisions, assist in developing the product and deriving insights after sessions, and enable the process leader to make well-informed decisions. The level of engagement between the assistance team and the process leader varies as needed, spanning from closely monitoring all stages of the process to providing focused assistance.



### **Focused and Time-Constrained Process**

A focused and time-constrained collaborative process is more effective. When everyone is clear about the starting and ending points, it's easier to grasp the process as a whole and approach it with a goal-oriented mindset. A focused and time-constrained process promotes more concise and relevant communication. Within the predetermined time frame, participants are encouraged to share the most important information, thus avoiding information overload and achieving greater clarity. Additionally, in a process that adheres to a reasonable time frame, there is an increased likelihood of achieving the anticipated product, while also reducing the risk of torpedoing the process midway due to policy and/or personnel changes.



### **Transparency and Expectation Management**

Transparency and expectation management are critical in collaborative processes because when all participants understand what is expected of them, they can collaborate more effectively. Therefore, the collaborative process always begins with expectation management, which includes presenting the background of the issue, the type of process, the collaboration question and the anticipated product. It's important that everyone understands the scope of the discussion and what aspects are beyond our control. Therefore, it's essential to define these parameters in advance.





## Varied Engagement Methods

Methodological diversity can boost participant engagement, maintain attention and interest, and enhance the effectiveness of the process. Different methods encourage participants to think and address problems from different angles, thus leading to more innovative ideas and solutions. Moreover, given that different methods may resonate with different audiences, providing a variety of options increases the likelihood that each participant will find a method to effectively express themselves. Methodological diversity requires careful planning in advance, and is derived from the goals of the process and its participants.

# Conclusion

The collaborative process is a tool that can significantly improve decision-making and the optimal promotion and implementation of policies.

However, this process demands effort and commitment from all parties involved. The model developed by the Ministry of Education provides an effective framework for planning and leading different types of collaborative processes. The model helps focus the process and outlines a path to its success.

This is a generic model that can be applied in many different contexts. The model focuses on two main phases: planning and leading.

**The planning phase** is critical to the success of the process, so it's important to dedicate sufficient time for it. In this phase, we define the need, the anticipated product, the process type, the collaboration question, the partners, the potential landmines, the Gantt chart, and the meeting plans.

During **the leading phase**, we conduct meetings with participants, gathering their contributions after each meeting, and developing the collected information into the anticipated product. In this phase, it's important that we manage participants' expectations right from the start, create discussions that allow different voices to be heard, promote product development, and update participants on progress.

Since there is no one-size-fits-all collaborative process, the model allows for customization to accommodate the specific needs of the issue, the anticipated product, and the characteristics of the participants involved.

**We hope this model will help you lead valuable and impactful collaborative processes.**



Ministry of Education  
The Pedagogical Secretariat

**Collaboration Architects**