



# Building a Sustainable Network: A Toolkit

By Paul Castelloe, Thomas Watson, and Katy Allen of Rural Support Partners

Supported by The Ford Foundation's Wealth Creation in Rural Communities – Building Sustainable Livelihoods Initiative

# Acknowledgements

---

**About the authors:** This toolkit was developed by Rural Support Partners, a social enterprise working across the rural southeastern United States to strengthen anchor organizations, foster strategic networks, and support asset-based economic development efforts. The team at Rural Support Partners that developed this toolkit consisted of Paul Castelloe, Thomas Watson, and Katy Allen.

**This toolkit was developed by:**

Rural Support Partners  
775 Haywood Rd., Suite K  
Asheville, NC 28806 USA  
www.ruralsupportpartners.com  
Thomas@ruralsupportpartners.com

**The authors offer the following special thanks:**

We thank Justin Maxson of Mountain Association for Community Economic Development (MACED) for his thoughts and contributions related to the framing, conceptualization, and planning of the research project from which this toolkit was developed.

We thank Deborah Markley of the RUPRI Center for Rural Entrepreneurship, Shanna Ratner of Yellow Wood Associates, and Wayne Fawbush of the Ford Foundation for their ideas, thoughts, and support related to the research project from which this toolkit was developed.

We also offer particular thanks to the 24 network practitioners who took the time to talk with us about their work as part of the research project from which this toolkit was developed.

This toolkit and the research report from which it was developed were supported by The Ford Foundation's Wealth Creation in Rural Communities – Building Sustainable Livelihoods initiative. The grant for the project came through the Center for Rural Entrepreneurship.

**To download a copy of this toolkit:** Visit the Wealth Creation in Rural Communities – Building Sustainable Livelihoods initiative website ([www.creatingruralwealth.org](http://www.creatingruralwealth.org))

**To use this toolkit:** The materials may not be packaged and resold to third parties, incorporated into training and redistributed for profit, or otherwise used for commercial purposes. The authors encourage use of the materials for educational purposes, organizational development, and capacity building by non-profit organizations. The materials may not otherwise be altered, transformed, or built upon without prior consent from the authors.

**To cite this toolkit:** Castelloe, P., Watson, T., & Allen, K. (2011). *Building a Sustainable Network: A Toolkit*. Asheville, NC: Rural Support Partners.

**Copyright 2011, Rural Support Partners**

# Table of Contents

<b>Introduction .....</b>	<b>1</b>
How to use this toolkit.....	1
Background for this toolkit .....	1
Ten building blocks for developing a strong network.....	2
<b>Section One: Considering a Network .....</b>	<b>3</b>
Worksheet 1: What could our organization potentially offer if we join a network? .....	4
Worksheet 2: What could our organization potentially gain if we join a network?.....	7
Worksheet 3: Is our organization ready to join a network?.....	10
<b>Section Two: Building a Network.....</b>	<b>13</b>
Worksheet 4: What is the heart and soul of this network?.....	14
Worksheet 5: What the structural components to consider as we build a network? .....	19
Worksheet 6: How do we develop shared plans for action?.....	27
<b>Section Three: Sustaining a Network .....</b>	<b>29</b>
Worksheet 7: Network self-assessment – How healthy is our network? .....	30
Worksheet 8: Network appraisal – Is this network worth our time?.....	32

## Introduction

This toolkit is a set of worksheets designed to help groups build strong, effective, sustainable networks. It was developed by Rural Support Partners and supported by The Ford Foundation's Wealth Creation in Rural Communities – Building Sustainable Livelihoods initiative, which is part of The Foundation's Expanding Livelihood Opportunities for Poor Households Initiative.

**How to use this toolkit.** We developed this toolkit for two main audiences. First, we developed this toolkit for emerging networks, or for organizations that might be thinking about forming a network. We pictured a group of organizations with common interests sitting around a table, wondering if, how, and why they might want to form a network. We tried to develop some worksheets that they might use to get started.

Second, we developed this toolkit for already-established networks. We pictured a network management team or facilitator sitting down with a group of organizations that has already formed as a network. In this scenario, the network has a history of organizing itself and working together. We pictured a facilitator leading a group of network members through a process where they re-evaluate their work together in order to take it to the next level. The toolkit provides guidance on the questions that this group might ask themselves, but not the processes that they might use to facilitate the answering of the questions.

We tried to write this toolkit for all audiences. It includes everything we thought might be useful for starting and developing a sustainable network. The toolkit uses a “kitchen sink” approach. We have thrown everything in the mix. Not everything will be useful to every network. So as you use this toolkit, feel free to choose the worksheets that you want or need. If you are starting a network from scratch, you might start with Worksheet One. If you are part of a well-established network, you might find Worksheet Seven to be the most useful.

**Background for this toolkit.** This toolkit accompanies a research project on rural networks working to create wealth that sticks in local communities. The research report is titled *Rural Networks for Wealth Creation: Impacts and Lessons Learned from US Communities* (to download a copy of the report, visit [www.creatingruralwealth.org](http://www.creatingruralwealth.org)). In our research, we defined *networks* as webs of organizations that are collaborating strategically to move forward a coordinated body of work. We conducted interviews with 24 practitioners at six different rural networks across the United States. We asked them about their networks, about how they are structured, how they get work done, and what they have achieved. After writing the research report, we realized that it included a great deal of information that is relevant to practitioners who are participating in, developing, or considering building a network. But much of that practical relevance was lost in the details of the research. We designed this toolkit to help strengthen the practice of building networks in rural areas.

As we looked over all of the findings from our research, a few key points stood out. Below we have outlined ten building blocks for developing a successful network. We begin this toolkit with these, because these ideas are for us the core of everything we learned from our research.

## Ten Building Blocks for Developing a Strong Network

1. **Trust and relationships.** Trust and relationships are the glue that holds a network together. They are built over time as network members work shoulder-to-shoulder on coordinated work that meets their organizations' and their communities' interests. Building trust enables networks to take more risks and share resources more willingly.
2. **Shared analysis, vision, interest, and identity.** Network members mentioned the importance of having or developing a shared analysis, a shared understanding of the challenges that the network is coming together to address. Related to this are a shared vision, a collective identity, a shared interest, and a shared sense of place.
3. **Shared direction, goals, measurement, and work.** Network members mentioned the importance of setting shared goals, developing collective plans, creating a shared measurement system, and working together on a coordinated, strategic body of work.
4. **Strong network management.** Strong network management is essential for networks to grow, thrive, and accomplish their goals. Having a capable, committed, skilled network management team is necessary rather than optional.
5. **Clear benefits for local people.** Network members emphasized that a network's efforts have to connect to the bread-and-butter issues that people face every day in their communities and work. Networks need to focus on getting something done; they also need to focus on something that everyone is concerned about.
6. **Shared power and control.** Networks operate most effectively and efficiently when power, control, and leadership is dispersed and balanced. Network managers, network staff, or staff at the network's sponsoring organization find ways to share decision-making, direction-setting, and planning with working groups and network members.
7. **Communication.** Communication within a network is important. People need to be in the loop and feel like they're part of the loop. Conversations among network members need to be focused on things that are of value to them, rather than getting together just to talk and share information.
8. **Enough structure, but not too much.** Network members described a balance between having enough structure and having too much. They felt that networks should focus on getting work done and let the processes, structures, and governance emerge from the network's collective efforts.
9. **Mutual accountability.** Network members need some way to hold each other accountable for moving the work of the network forward. This accountability can be either formal or informal, but it needs to be effective.
10. **Clear benefits for member organizations.** Network members are most engaged when there are clear and strong benefits for their organizations and their work.

## Section One: Considering a Network

This section includes three worksheets for organizations that are considering joining or building a network. The worksheets in this section include the following:

- 1. What Could Our Organization Potentially Provide if We Join a Network?**
- 2. What Could Our Organization Potentially Gain if We Join a Network?**
- 3. Is Our Organization Ready to Join a Network?**

We view all of these worksheets as optional rather than necessary or prescribed. We recommend that you look through them and use the worksheets that you think will be helpful for your planning and your work.

Also, we see these as some of the questions you might want to ask yourselves. With some of these questions, it might be helpful to have a skilled, experienced facilitator lead you towards your answers. We have not provided guidance on how that process might be facilitated. We leave that up to your group and its facilitator.

## Worksheet 1

### What Could Our Organization Potentially Offer if We Join a Network?

To prepare for developing effective networks, your organization may want to identify the assets and capacities that you possess that may be valuable to other members of a potential network. This helps identify the assets that your organization brings to the table when thinking about joining other organizations in a network. Later you can focus on the vision and goals of the network (see Worksheet 4); this worksheet focuses on naming the organizational assets you could potentially bring to a network.

To complete this worksheet, read the following list of assets and capacities that organizations often bring to networks. In each of these areas of capacity, rate whether you feel like your organization is extremely strong, strong, OK, weak, or very weak. Briefly comment upon your organizations assets and capacities in each area, if and when that seems relevant.

<b>1. Mission, vision, and analysis.</b> How strong is our organization’s purpose, reason for being, vision for the future, and analysis of the challenges that we are trying to address?				
<input type="checkbox"/> Very strong	<input type="checkbox"/> Strong	<input type="checkbox"/> OK or Decent	<input type="checkbox"/> Weak	<input type="checkbox"/> Very Weak
Comments:				
<b>2. Presence or reputation.</b> How strong is our reputation? Do we have a well-known name, credibility across our region, and an excellent reputation?				
<input type="checkbox"/> Very strong	<input type="checkbox"/> Strong	<input type="checkbox"/> OK or Decent	<input type="checkbox"/> Weak	<input type="checkbox"/> Very Weak
Comments:				

<p><b>3. Relationships and connections.</b> How strong are our organization’s relationships with other important organizations, with funders, with policy-makers or decision-makers? How well connected is our organization – locally, regionally, or nationally?</p>				
<input type="checkbox"/> Very strong	<input type="checkbox"/> Strong	<input type="checkbox"/> OK or Decent	<input type="checkbox"/> Weak	<input type="checkbox"/> Very Weak
Comments:				
<p><b>4. Organizational expertise.</b> How strong is our organization’s expertise in the areas in which we work? Does our organization have a set of best practices or approaches that are recognized as innovative, strong, exemplary, or particularly solid?</p>				
<input type="checkbox"/> Very strong	<input type="checkbox"/> Strong	<input type="checkbox"/> OK or Decent	<input type="checkbox"/> Weak	<input type="checkbox"/> Very Weak
Comments:				
<p><b>5. Programs and projects.</b> How strong are our organization’s programs and projects? Are they considered to be model or exemplary? Do other organizations ask for training or advice related to our programs and projects?</p>				
<input type="checkbox"/> Very strong	<input type="checkbox"/> Strong	<input type="checkbox"/> OK or Decent	<input type="checkbox"/> Weak	<input type="checkbox"/> Very Weak
Comments:				
<p><b>6. Organizational health.</b> How strong is our organization in terms of its overall organizational development? How strong is our board? Our fundraising efforts? Our financial management systems? Our planning and evaluation systems?</p>				
<input type="checkbox"/> Very strong	<input type="checkbox"/> Strong	<input type="checkbox"/> OK or Decent	<input type="checkbox"/> Weak	<input type="checkbox"/> Very Weak
Comments:				

<b>Other:</b>				
<input type="checkbox"/> Very strong	<input type="checkbox"/> Strong	<input type="checkbox"/> OK or Decent	<input type="checkbox"/> Weak	<input type="checkbox"/> Very Weak
Comments:				
<b>Other:</b>				
<input type="checkbox"/> Very strong	<input type="checkbox"/> Strong	<input type="checkbox"/> OK or Decent	<input type="checkbox"/> Weak	<input type="checkbox"/> Very Weak
Comments:				

Looking over all of the items above, the two or three main assets, strengths, or capacities that we could potentially bring to a network are the following:

What, if anything, should we do to clarify and strengthen the assets or capacities that we could potentially bring to a network? What might we do to get our own organizational house in order, so that we could be a better network member?

Are there any additional thoughts or notes?

## Worksheet 2

### What Could Our Organization Potentially Gain if We Join a Network?

To prepare for developing effective networks, your organization may want to identify the benefits that you may gain by joining a network. This helps make it clear whether it will likely be worth the time and money, because working in a network will definitely cost your organization time and money.

To complete this worksheet, read the following list of potential benefits that organizations can potentially gain when they join networks. In each of these areas, rate whether you feel like a particular potential benefit is extremely important, very important, moderately important, not very important, or not at all important. Briefly comment upon a particular benefit, if and when that seems relevant.

<p><b>1. Relationships.</b> By joining a network, we could develop relationships and trust with other organizations, which could potentially allow us to carry out efforts to improve communities that are more visionary, more risky, broader in scope and scale, and more effective.</p>				
<input type="checkbox"/> Extremely Important	<input type="checkbox"/> Very Important	<input type="checkbox"/> Moderately Important	<input type="checkbox"/> Not So Important	<input type="checkbox"/> Not At All Important
<p>Comments:</p>				
<p><b>2. New knowledge, information, and skills.</b> By joining a network, we could potentially gain new knowledge, information, and skills for doing our work better.</p>				
<input type="checkbox"/> Extremely Important	<input type="checkbox"/> Very Important	<input type="checkbox"/> Moderately Important	<input type="checkbox"/> Not So Important	<input type="checkbox"/> Not At All Important
<p>Comments:</p>				

<p><b>3. New models, practices, and approaches.</b> By joining a network, we could potentially learn about or adopt new models, practices, and approaches for doing our work better.</p>				
<input type="checkbox"/> Extremely Important	<input type="checkbox"/> Very Important	<input type="checkbox"/> Moderately Important	<input type="checkbox"/> Not So Important	<input type="checkbox"/> Not At All Important
<p>Comments:</p>				
<p><b>4. Stronger leaders, stronger organization.</b> By joining a network, we could potentially become a stronger organization with stronger leaders as we learn about new knowledge, skills, and approaches from other organizations.</p>				
<input type="checkbox"/> Extremely Important	<input type="checkbox"/> Very Important	<input type="checkbox"/> Moderately Important	<input type="checkbox"/> Not So Important	<input type="checkbox"/> Not At All Important
<p>Comments:</p>				
<p><b>5. More funding.</b> By joining a network, we could potentially receive funds through grants awarded to the network. We could also potentially gain access to new foundations.</p>				
<input type="checkbox"/> Extremely Important	<input type="checkbox"/> Very Important	<input type="checkbox"/> Moderately Important	<input type="checkbox"/> Not So Important	<input type="checkbox"/> Not At All Important
<p>Comments:</p>				
<p><b>6. Greater results.</b> When the work of many organizations is aligned and coordinated, it is possible to have broader and deeper impacts than any single organization could achieve alone. By joining a network, we could see greater results in the communities where we work.</p>				
<input type="checkbox"/> Extremely Important	<input type="checkbox"/> Very Important	<input type="checkbox"/> Moderately Important	<input type="checkbox"/> Not So Important	<input type="checkbox"/> Not At All Important
<p>Comments:</p>				

<p><b>7. Greater influence.</b> A network of organizations working in coordination is far more capable of building the collective voice and power needed to bring about fundamental, long-term changes in communities. By joining a network, we would be better able to generate the numbers that we need to bring about systemic change and policy change.</p>				
<input type="checkbox"/> Extremely Important	<input type="checkbox"/> Very Important	<input type="checkbox"/> Moderately Important	<input type="checkbox"/> Not So Important	<input type="checkbox"/> Not At All Important
<p>Comments:</p>				
<p><b>Other:</b></p>				
<input type="checkbox"/> Very strong	<input type="checkbox"/> Strong	<input type="checkbox"/> OK or Decent	<input type="checkbox"/> Weak	<input type="checkbox"/> Very Weak
<p>Comments:</p>				

Looking over all of the items above, the two or three main benefits that we could potentially gain by participating in a network are the following:

What, if anything, should we do to clarify and rate the benefits that we could potentially gain by joining a network?

Do we need to make any additional thoughts or notes?

## Worksheet 3

### Is Our Organization Ready to Join a Network?

Not every organization is ready to join a network. First, organizations will probably want to be at a certain level of organizational stability and solidity before joining a network. Second, joining a network will definitely cost your organization time and money. You may want to make sure you have a little time and money to spare. Asking yourself about these issues can give you a sense of whether your organization is ready, and whether the potential benefits of joining a network are likely to outweigh the costs.

To complete this worksheet, read the following list of organizational capacities. In each of these statements related to areas of capacity, respond by checking definitely, probably, not sure, probably not, or definitely not. Briefly comment upon your organizations assets and capacities in each area, if and when that seems relevant.

<b>1. Time and money.</b> Do we have the people power or staff time to give to a network? Do we have the money to cover the staff time we will need to devote to a new network?				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Definitely	Probably	Not Sure	Probably Not	Definitely Not
Comments:				
<b>2. Effective governance.</b> Are our systems of organizational governance (e.g., our board) strong enough that we feel comfortable adding on the extra stress, time, and money related to joining a network? Are we strong enough in our organizational capacity to adequately set policies, set directions, make decisions well, and evaluate our organizational growth – even if we join a new network?				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Definitely	Probably	Not Sure	Probably Not	Definitely Not
Comments:				

<p><b>3. Effective management.</b> Are the systems we use to plan, implement, and evaluate our work strong enough to continue at a high level if we join a network?</p>				
<input type="checkbox"/> Definitely	<input type="checkbox"/> Probably	<input type="checkbox"/> Not Sure	<input type="checkbox"/> Probably Not	<input type="checkbox"/> Definitely Not
<p>Comments:</p>				
<p><b>4. Quality programs.</b> Are our programs and projects strong and solid enough that we feel comfortable adding on the extra stress, time, and money related to joining a network?</p>				
<input type="checkbox"/> Definitely	<input type="checkbox"/> Probably	<input type="checkbox"/> Not Sure	<input type="checkbox"/> Probably Not	<input type="checkbox"/> Definitely Not
<p>Comments:</p>				
<p><b>5. Sound finances.</b> Are our fundraising and financial management systems strong enough that we feel comfortable adding on the extra stress, time, and money related to joining a network?</p>				
<input type="checkbox"/> Definitely	<input type="checkbox"/> Probably	<input type="checkbox"/> Not Sure	<input type="checkbox"/> Probably Not	<input type="checkbox"/> Definitely Not
<p>Comments:</p>				
<p><b>6. Organizational culture.</b> Has our organization shown that we are open to new activities, opportunities, challenges, and initiatives? Are we good at risk-taking? Are we good at learning from our experiences even when are not successful?</p>				
<input type="checkbox"/> Definitely	<input type="checkbox"/> Probably	<input type="checkbox"/> Not Sure	<input type="checkbox"/> Probably Not	<input type="checkbox"/> Definitely Not
<p>Comments:</p>				

Given our answers to these questions, are we ready to join a network?

What, if anything, do we need to do to get ourselves ready?

If we need to develop our capacity in one of the areas in this worksheet, should we go ahead and join a network and develop our capacities as we move along? Or should we develop the capacities first, and join the network only when we are on more solid footing?

If we do join a network, should we limit our involvement in the network until we are able to strengthen our organizational capacity?

Do we have any additional thoughts or notes?

## Section Two: Building a Network

This section includes three worksheets for organizations that are considering developing or building a network. The worksheets in this section include the following:

- 1. What Is the Heart and Soul of this Network? What Gives It Meaning and Purpose?**
- 2. What Are the Structural Components to Consider as We Build a Network?**
- 3. How Do We Develop Shared Plans for Action?**

We view all of these worksheets as optional rather than necessary or prescribed. We recommend that you look through them and use the worksheets that you think will be helpful.

Also, we see these as some of the questions you might want to ask yourselves. With some of these questions, it might be helpful to have a skilled, experienced facilitator lead you towards your answers. We have not provided guidance on how that process might be facilitated. We leave that up to your group and its facilitator.

## Worksheet 4

### What Is the Heart and Soul of this Network?

The heart and soul of a network is the collective vision, work, and identity of its members. The results that we see in local communities give networks their purpose. This worksheet asks you to think about the primary reasons for this network’s development and existence. Why are you building a network? What will be the concrete benefits for your organization, your work, and the communities that you are a part of?

To complete this worksheet, jot down a few thoughts related to the questions below.

**I. Benefits for local people.** Ultimately, being part of a network should strengthen our work in the communities that we work in. What are the benefits or results that we hope to see for local people that might result from forming a network? Are these outcomes worth the time and money that building a network would require?

Comments or thoughts:

**2. Benefits for our organization.** Ideally, forming a network will benefit our organization in several ways. Worksheet 2 (see above) mentions several potential benefits: relationships; new knowledge, information, and skills; new models, practices, and approaches; strengthening our organization; more funding; greater results; and greater influence. Which of these are most relevant for our organization?

Comments or thoughts:

**3. Shared analysis.** What is our analysis of the challenges, problems, or needs that this network is coming together to address? Is that analysis shared among network members?

Comments or thoughts:

**4. Shared vision.** What is the network's vision for bringing about change? Is that vision broad enough to incorporate all particular strategies that could potentially be effective? Is that vision shared among network members?

Comments or thoughts:

**5. Shared identity.** Is there a shared or collective identity that binds together the members of our network? What is that collective identity, and how can network members build upon it as we work together?

Comments or thoughts:

**6. Shared direction.** As a network, do we want network members to share a common direction in their collective work? What might the network's overarching direction be? How broad or focused do we want our shared direction to be? Can it be broad enough to include multiple strategies, yet also focused enough to bring about significant impacts or results?

Comments or thoughts:

**7. Shared goals.** Do we want network members to have common goals for their work? Or do we want to have a shared overarching direction, with network members setting separate and individual goals for moving in that overall direction? If we want shared goals, what might those goals be?

Comments or thoughts:

**8. Shared work.** Do we expect members of the network to work together to carry out a coordinated, strategic body of work? Or do we want to set a general direction for the network, and then have network members move in that direction using whatever strategies, activities, projects, or programs that they choose?

Comments or thoughts:

**9. Defining the work of the network.** What is the work of the network, as compared to the work of network members? How is the work of the network different from the work of its individual members? What work and outcomes will occur across the whole network, and how are these different from the work and outcomes of our individual members?

Comments or thoughts:

**10. Shared measurement.** Do we want to have a common measurement system that all network members are using? Do we want network members to be tracking their outcomes using the same data collection framework and the same data collection system? Or will each network member evaluate its own work, using its own evaluation framework and system?

Comments or thoughts:

**11. Shared power and control.** How will network members share power and control? If there is a management team or a sponsoring organization, how will network members ensure these entities continually share power with members?

Comments or thoughts:

**12. Trust and relationships.** Trust and relationships are the glue that holds a network together. How will our network create time and space for network members to build trust and relationships with one another? In most networks, members build trust and relationships by getting work done that is important to everyone. But networks have to allow time and space for getting to know each other as well as getting work done. How do we plan to do that?

Comments or thoughts:

**13. Putting it all together.** Taken together, the 12 items above cover the heart and soul of a network and its work. Most of these things are intangible. They aren't action-focused, and they aren't structures that networks use to function. But these are probably the things that matter most. Looking back over all of the responses above, are there any closing thoughts about these issues? Do we have any closing thoughts about what will give our network meaning and purpose for its members?

Closing thoughts:

## Worksheet 5

### What Are the Structural Components to Consider as We Build a Network?

This worksheet focuses on the structural components of networks, the entities and practices that networks use to manage their work and get their work done. Every network will be different. Also, in most networks, the structure of a network will emerge organically from its work. Still, there are certain components that are found in most networks. You may want to think about them as you develop the network you are involved with.

To complete this worksheet, check an option (or two) related to each component of a network. You're not committing yourself to any of these options; rather, you're checking the option that makes sense right now. There is also some space to make comments, if any seem relevant.

**I. Legal structure.** There is a range of potential legal structures for networks, ranging from completely informal to legal incorporation with state and federal governments. Which of the options below makes the most sense for our network as it exists right now?

- Informal:** The network has no legal or formal structure and no designated fiscal sponsor to handle funds that are designated for the network.
- Informal with Fiscal Sponsor:** The network has no legal structure, but it has a designated fiscal sponsor to handle funds that are designated for the network.
- Project of a Larger Organization:** The network is a project or program of a larger organization, which handles management, fundraising, and oversight duties.
- Legal incorporation:** The network is formally and legally incorporated (e.g., as a nonprofit organization and / or a Limited Liability Company).

Comments:

**2. Membership.** There are several different choices related to membership. Which of the options below seems to make the most sense for our network? There are no right or wrong answers; they all have their pros and cons.

**2A. Membership homogeneity or heterogeneity.**

- Heterogeneity:** Some networks have a varied, diverse membership.
- Homogeneity:** Some networks are made up of groups with similar purposes, similar areas of work, and / or similar geographic focus.

**2B. Open or closed membership.**

- Open membership:** In some networks, membership is generally open and floating, and members are best describes as participants rather than members.
- Closed membership:** In some networks, membership is closed to new members without approval.

**2C. Membership commitment.**

- Required commitment:** Some networks have clear expectations for involvement and commitment, to which each member of the network is expected to commit.
- Flexible commitment:** In some networks, each member, depending on their interests and time, defines their amount of involvement in the network.

**2D. Membership growth.**

- Strategic growth:** Some networks have grown in size by being thoughtful and strategic about adding new members.
- No growth:** Some networks have chosen to remain the same size over time.

Comments:

**3. Structures for getting work done.** There is a range of potential structures for getting work done in a network. Which of the options below seems to make the most sense for our network? Many networks use several of these structures simultaneously, with varying degrees of involvement.

- Working groups:** Many networks have long-standing, ongoing groups that focus on key pieces of work for the whole network. Working groups can be based on issues (e.g., a particular focus of work) or geography (e.g., a state caucus).
- Management team:** In some networks, the management team (or the staff that play a management role) is also involved in planning and carrying out the work of a network, even though its primary function may be network management.
- Core group:** In some networks, a core group (made up of representatives of working groups or members) is also involved in planning and carrying out the work of a network, even though its primary function may be network management.
- Staff:** Some networks, particularly those that are formally incorporated, have a paid, permanent (rather than contract) staff team; this staff management team is typically involved in planning and carrying out the work of a network, even though its primary function may be network management and coordination.

Comments:

If we plan to have working groups, what might those working groups focus on?

**4. Structures for governing a network.** There is a range of potential structures for governing a network. Which of the options below seems to make the most sense for our network? Many networks use several of these structures at once.

- Core group:** Usually there is some group that is charged by the network with making decisions. We call this the *core group*, but some networks call this group their steering committee or their general committee. Whatever the term used, this is the group that is charged with coordinating the network's work and development, thinking strategically, and making major network decisions.
- Executive committee:** Some networks have a smaller group, an *executive committee*, that is charged with making smaller, more day-to-day decisions about network management and operations, decisions that do not need to go before the larger core group.
- Network board and staff:** Some networks, particularly those that are formally incorporated, have a staff and board of directors. In these networks, the staff and board played most of the decision-making roles that the core group plays in networks that have not formally or legally organized themselves as a corporation.

Comments:

If we plan to have a core group, what might be some of that group's roles and responsibilities?

<p><b>5. Financial management.</b> Various groups or entities will need to focus on different aspects of raising and managing money for our network. The questions below can help us think about and plan our network’s financial management system. In each question, different groups may take on different roles; we can note that in the comments section below each item.</p>				
<p><b>5A. Raising money.</b> Who will be primarily responsible for raising money for the network? Who will be responsible for researching sources of funding, developing and maintaining relationship with funders, writing grant proposals, managing grants, writing grant reports, etc?</p>				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Core Group	Management Team	Board or Staff	Working Groups	Other
<p>Comments:</p>				
<p><b>5B. Managing money.</b> Who will be primarily responsible for keeping track of income and expenses, keeping the network’s books, setting financial policies, and so on?</p>				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Core Group	Management Team	Board or Staff	Working Groups	Other
<p>Comments:</p>				
<p><b>5C. Spending money.</b> Who will be primarily responsible for setting the network’s budget, making decisions about spending, and so on?</p>				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Core Group	Management Team	Board or Staff	Working Groups	Other
<p>Comments:</p>				

<p><b>6. Network meetings.</b> Various entities within networks meet with varying frequencies. Which of the options below seems to make the most sense for our network?</p>				
<p><b>6A. Working group meetings.</b> About how often do we think the working groups in our network (the groups where work gets done) will need to meet?</p>				
<input type="checkbox"/> Monthly	<input type="checkbox"/> Every Other Month	<input type="checkbox"/> Quarterly	<input type="checkbox"/> Twice a Year	<input type="checkbox"/> Annually
<p>Comments:</p>				
<p><b>6B. Core group meetings.</b> About how often do we think the core group in our network (the group that makes decisions and thinks strategically) will need to meet?</p>				
<input type="checkbox"/> Monthly	<input type="checkbox"/> Every Other Month	<input type="checkbox"/> Quarterly	<input type="checkbox"/> Twice a Year	<input type="checkbox"/> Annually
<p>Comments:</p>				
<p><b>6C. Other meetings.</b> What other groups do we think we will have in our network? _____ . How often do we think these groups will need to meet?</p>				
<input type="checkbox"/> Monthly	<input type="checkbox"/> Every Other Month	<input type="checkbox"/> Quarterly	<input type="checkbox"/> Twice a Year	<input type="checkbox"/> Annually
<p>Comments:</p>				
<p><b>6D. Other meetings.</b> What other groups do we think we will have in our network? _____ . How often do we think these groups will need to meet?</p>				
<input type="checkbox"/> Monthly	<input type="checkbox"/> Every Other Month	<input type="checkbox"/> Quarterly	<input type="checkbox"/> Twice a Year	<input type="checkbox"/> Annually
<p>Comments:</p>				

**7. Network management.** Most successful networks have a person or team that focuses on managing the network. There is a range of roles and responsibilities that network management teams play. Look over the list of network management roles below, and prioritize them. Put “1” by your highest priority, “2” by your next highest priority, and so on. These priorities can help us decide what to look for in our network management team.

Priority	Network Management Roles and Responsibilities
	<b>Coordinating network tasks.</b> Network management teams wake up every day thinking about the network and its work so that members don’t have to. They address the details of network logistics, manage networks tasks and timelines, manage the network’s meetings, and plan and coordinate large network events.
	<b>Facilitation.</b> Network management teams facilitate face-to-face meetings and conference calls (keeping the group on track and moving forward), develop agendas for meetings of network members, and capture key reference points for the group.
	<b>Lead thinking and leadership.</b> Network management teams hear members’ ideas, synthesize them, throw out what they are hearing and what they think ought to be done, then take members’ direction as the group moves forward.
	<b>Vision.</b> Network management teams are true believers in what the network is trying to get done. They share the network’s vision, but their vision is broad enough to incorporate all of the various strategies that the network might use.
	<b>Managing network structure and relationships.</b> Network management teams reflect on the network’s structure in order to improve it, understand each member of the network and where it wants to go, make sure all of the groups within the network are coordinating well, and weave together network relationships.
	<b>Communications.</b> Network management teams make sure all meetings and communication have value for members. They communicate regularly with members and serve as a clearinghouse for network documents and information.
	<b>Administration.</b> Network management teams manage the administrative needs of the network (e.g., making sure grant agreements are filed).
	<b>Data collection and reporting.</b> Network management teams help the network develop and use shared measurement and evaluation systems for its work, and develop summary reports of outcomes.
	<b>Fundraising.</b> Network management teams write grant proposals and reports, serve as a liaison between members and funders, and connect members with funders.
	<b>Organizational development support.</b> Network management teams support organizations’ development and help them in times of crisis.
	<b>Policy work.</b> Network management teams coordinate broad-scale policy efforts (in policy-oriented networks), work with network members on specific policy advocacy efforts, and maintain relationships with congressional and government agency staff.

<b>8. A few other questions.</b> Below are a few other questions about building a network.
<b>8A. Communication.</b> Communication within a network is crucial. Communication includes meetings, conference calls, and emails. Especially for meetings and conference calls, network communications need to have value for network members. Nobody has time to waste. Also, network members need to be in the loop and feel like their part of the loop. How will we make sure our network’s communications are effective and efficient?
Comments:
<b>8B. Decision-making.</b> What decision-making process do we want to use in our network? Which entities or groups will make which decisions?
Comments:
<b>8C. Mutual accountability.</b> How will network members hold each other accountable? What will happen when a network member fails to do what was planned and agreed on? What are the most important levels of accountability that our network needs to think about (e.g., members’ accountability to each other, the network’s accountability to funders, the network’s accountability to local communities)?
Comments:

## Worksheet 6

### How Do We Develop Shared Plans for Action?

It is complex and challenging to develop shared goals and shared plans for action for a network. Honestly, it's going to take a lot of hard conversations among network members and some high-quality facilitation by the network management team (or whoever facilitates the process). There are many different approaches to developing shared plans for action. You'll need to look into these, and choose one. Whichever you choose, it's going to take a lot of time.

So this worksheet may be relatively less useful than the other worksheets in this toolkit. You won't be able to quickly fill this worksheet out. Setting shared plans for action is too complex and too complicated for a worksheet to help much. Also, action-planning is something that all network members will have done many times within their organizations. This worksheet doesn't introduce anything that the members of your network aren't already very familiar with.

Still, we offer this worksheet as a reminder to plan for action. Improving local communities in some way is why all networks exist. To improve local communities, you have to make plans. We would be leaving out a huge part of the network-building process if we didn't include some sort of planning tool, however basic.

To complete this planning template, list a few overarching goals for the network's efforts, and then list some of the activities or actions that will need to be done to reach those goals.

**I. Goals of the network.** What are the 1-3 most important goals of our network? Ultimately, what are we trying to get done by working together?

Major goals:



## Section Three: Sustaining a Network

This section includes two worksheets for networks to use to sustain themselves or become stronger once they are up and running. These two worksheets include the following:

- 1. Network Self-Assessment: How Healthy Is Our Network?**
- 2. Network Appraisal: Is this Network Worth Our Time?**

We view these worksheets as optional rather than necessary or prescribed. We recommend that you look through them and use the worksheets that you think will be helpful.

Also, we see these as some of the questions you might want to ask yourselves. With some of these questions, it might be helpful to have a skilled, experienced facilitator lead you towards your answers. We have not provided guidance on how that process might be facilitated. We leave that up to your group and its facilitator.

## Worksheet 7

### Network Self-Assessment: How Healthy Is Our Network?

This worksheet provides a way for networks that have been operating for a while to assess how they are doing and set priorities for strengthening various areas of functioning.

For each indicator of network capacity listed below, circle your network’s capacity (low, medium, or high) in this area. Then circle how high a priority (low, medium, high) this capacity is for your network to address, work on, strengthen, or improve.

Indicator of Network Capacity	Capacity	Priority
<b>1. Trust and relationships.</b> Our network members trust each other and have strong relationships. This allows us to take more risks and share resources more willingly as a network.	L M H	L M H
<b>2. Shared analysis, vision, and identity.</b> Our network has a shared analysis of the challenges we are addressing, a shared vision for the future of our region, and a collective identity.	L M H	L M H
<b>3. Shared goals, work, and measurement.</b> Our network has common goals, a coordinated and strategic body of work, and a shared measurement system that we all use to measure the same outcomes.	L M H	L M H
<b>4. Strong network management.</b> We have a capable, committed network management team that is able to coordinate the network and its details, facilitate meetings, and provide vision and lead thinking.	L M H	L M H
<b>5. Clear benefits for local people.</b> The efforts and work of our network is resulting in clear benefits in local communities. We’re getting things done – things that our members really care about.	L M H	L M H
<b>6. Shared power and control.</b> Power, control, and leadership are dispersed, diffuse, and balanced across our network.	L M H	L M H
<b>7. Communication.</b> Our meetings and calls are useful and meaningful (rather than a waste of time). Network members are in the loop and part of the loop.	L M H	L M H

Indicator of Network Capacity	Capacity	Priority
<p><b>8. Enough structure, but not too much.</b> Our network has evolved with enough structure (e.g., groups and processes) to get done what we need to get done, but not too much structure that members have become weighed down by it (e.g., stretched too thin and burned out).</p>	L M H	L M H
<p><b>9. Mutual accountability.</b> Our network has systems of mutual accountability that work, whether they are formal or informal.</p>	L M H	L M H
<p><b>10. Clear benefits for members.</b> Our network members are getting more out of the network than they are putting in. Membership and participation are worth members' time and money.</p>	L M H	L M H
<p><b>11. Meetings.</b> Our network's regular meetings are worthwhile. We only meet when we need to. We are effective and efficient when we meet. We don't waste people's time in meetings or calls. When we meet, we are able to do what we had planned to get done.</p>	L M H	L M H
<p><b>12. Membership.</b> The size, diversity, openness, and commitment of the network's members are working for everyone.</p>	L M H	L M H
<p><b>13. Financial management.</b> Our network is able to raise, manage, and spend money in a way that is effective and responsible.</p>	L M H	L M H
<p><b>14. Legal structure.</b> Our network's legal structure (e.g., informally structured, fiscal sponsorship, legal incorporation) is working for us.</p>	L M H	L M H
<p><b>15. Governance.</b> Our network is governed effectively. We are able to set direction, think strategically, and bring all of our parts together.</p>	L M H	L M H
<p><b>16. Decision-making.</b> Our decision-making processes and systems are working well. We make decisions efficiently, record those decisions, and build upon decisions we have made as we move forward.</p>	L M H	L M H
<p><b>17. Conflict.</b> When conflict arises within the network, we are able to address it and manage it. Our network is structured to allow for differences of opinion. Everyone doesn't have to agree in order to move pieces of our collective work forward.</p>	L M H	L M H
<p><b>What are our network's top priorities for further growth and development?</b></p>		

## Worksheet 8

### Network Appraisal: Is this Network Worth Our Time?

This worksheet is a tool that an organization can use to review its participation in a network. If the costs of network participation outweigh the benefits, then there is no reason to participate. This worksheet helps you figure out whether or not that might be the case.

To complete this worksheet, simply answer the questions below.

<b>1. Benefits.</b> Is our organization’s participation in this network significantly benefitting the communities in which we work?				
<input type="checkbox"/> Definitely	<input type="checkbox"/> Probably	<input type="checkbox"/> Not Sure	<input type="checkbox"/> Probably Not	<input type="checkbox"/> Definitely Not
If so, how?				
<b>2. Learning</b> What are we learning through participation in this network? What are we learning about our work? What are we learning about being a member of this network? Are there any major challenges that we face by participating in this network?				
Learning:				

<p><b>3. Strategic fit.</b> Is our organization’s participation in this network a good strategic fit for us? Do our vision, goals, and activities align well with those of the network? Is there an alignment between what we’re trying to do as an organization and what the network is trying to do?</p>				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Definitely	Probably	Not Sure	Probably Not	Definitely Not
<p>Comments:</p>				
<p><b>4. Costs of network participation.</b> Do we know what the costs of network involvement are for our organization – in both time and money? How do we track these costs?</p>				
<p>Costs of network involvement: Time</p>				
<p>Costs of network involvement: Money (including staff time)</p>				
<p><b>5. Worth the costs?</b> Do the network-related benefits that we see in our organization, our work, and our communities justify the costs of participating in the network?</p>				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Definitely	Probably	Not Sure	Probably Not	Definitely Not
<p>If so, in what ways?</p>				
<p><b>6. What’s next?</b> Given the review above, and given our current organizational capacity, does our organization want to maintain, increase, decrease, or abandon our participation in this network?</p>				
<p>Next steps:</p>				