

HOLDING ENVIRONMENT CHECKLIST

PURPOSE: To give your collaboration an overview of the components it requires to begin working.

CONTEXT: Use this before or after setting up your collaboration to give you goals to work towards, or to check that you have everything in place before moving onwards.

INSTRUCTIONS: You can use this as an agenda to work through as a group – or else as a group checklist after you have begun. You could also get different members of your collaboration to fill in to get a sense of whether you all agree that you are ready.

COMPONENTS OF HOLDING ENVIRONMENT	IN PLACE	TO DO
STRUCTURE & SAFETY New structures and processes created for people to surface & discuss values, perspectives and ideas.		
SHARED LANGUAGE Stakeholders understand the terminology, concepts and frameworks being used to collaborate		
SHARED VALUES & PURPOSE Values and shared purpose in place.		
PHYSICAL ENVIRONMENT A space to enable learning and dialogue e.g.: location, room set up, environment		
RELATIONSHIPS Current credibility and relationship with stakeholders – e.g. expertise, practice and reputation. Confidentiality is trusted.		
CLARITY AND TRUST IN AUTHORITY Functions of protection, direction and order are in place and there is sufficient trust in the role/organisation to hold authority role.		

COMPONENTS OF HOLDING ENVIRONMENT	IN PLACE	TO DO
EXISTING CULTURE History and style of the group dynamics - bonds, norms, values, rituals		
FACILITATION Role or skill present of Internal or external facilitation – able to work with objectivity and neutrality		
TIME Provision of clear time boundaries for collaborative work within a long term context.		
WHO ARE THE STAKEHOLDERS Do the current stakeholders represent the dynamics of the issue you’re addressing? Do they bring diversity, influence, resources skills		
URGENCY Is there readiness and urgency for change on this issue?		