RESILIENCYPLUS

A quick guide on process and coaching

ResiliencyPlus Framework - PartnersGlobal

CONTENTS

INTRODUCTION

A. Background and Purpose

In July 2020, the National Endowment for Democracies (NED) engaged **Partners**Global to promote new models for building civil society resilience in Central Europe. In partnership with our sister organizations Partners for Democratic Change Slovakia and Partners Hungary, **Partners** implemented a 17-month civil society resilience-building project using our trademark **Resiliency**Plus Framework (R+). R+ is a new approach to understanding the challenges of a shrinking civic space and charting a path for civil society organizations and actors to adapt and thrive in response.

Thanks to the generous support from NED, **Partners** has produced the following document to provide a quick overview of the R+ Framework as well as some guidance on how to operationalize (the R+ Process) with local organizations interested in strengthening their resilience. Our long-term vision, with support from NED and other funders, is to establish a lasting infrastructure of resiliency support for civil society in the region. We hope that this quick guide on process and coaching will contribute to that vision.

B. Intended Audience and Using this Guide

This quick guide was envisioned to serve as a tool for civil society experts that wish to become -or are currently serving as- Resiliency Coaches and facilitate a resiliency-building process with local organizations. This guide is also expected to serve local, regional, and international civil society organizations that might not have access to an independent/external Resiliency Coach, but that still wish to implement a self-guided version of the R+ Process. In this sense, we have provided additional notes and tips throughout the guide for these self-guided implementations.

It is important to highlight that most of the theoretical and conceptual notions and approaches that inform **Resiliency**Plus included in this guide have been summarized for ease of reading and to avoid repetition. In this sense, this guide should be used in tandem with the most updated version of the **Resiliency**Plus Framework, which is available at **Partners**Global's [website]. We have included sample agendas, worksheets, and other resources as annexes to this guide, but additional detailed information can be found in the Framework itself.

The **Partners**Global DC team is available at [resiliencyplus@partnersglobal.org] to answer any questions related to this guide and to provide additional resources and tips regarding the implementation of the **Resiliency**Plus Process.

C. Structure of the Guide

This quick guide is organized in two main sections. The first section of the guide provides a summary of the **Resiliency**Plus Framework: it's history, logic, and key assumptions and definitions. In this sense, additional concepts, theoretical and methodological approaches and justifications, as well as a detailed bibliography, can be found there. As stated above, we have decided to only provide a quick summary to avoid repetition and for ease of reading in this guide.

The second focuses on the operationalization of the Framework: the **Resiliency**Plus Process. Here we present the current version of the process, which has been refined based on the lessons learned and feedback from our NED-supported work, but also from other implementations in other parts of the world. This second section provides detailed descriptions of the five steps of the R+ Process as well as sample agendas, recommendations, and other tips.

I. **RESILIENCY**PLUS**:** AN OVERVIEW

A. Background

PartnersGlobal and the Partners Network have a track record of working for more than 30 years defending and promoting human rights, democracy, and the Rule of Law, as well as supporting local civil society leaders and organizations to achieve open, just, inclusive, and sustainable societies around the world. Since our founding in 1989, **Partners**Global has supported and accompanied local civil society leaders and organizations in over 50 countries as they lead institutional change management and advocacy processes to consolidate democracy, human rights, and the Rule of Law.

As part of this work, **Partners**Global, in close collaboration with CIVICUS, developed a new approach to organizational strengthening and change management that considers the growing trend of closing civic space and incorporates the three levels of resilience: individual, organizational, and sectoral. We call it **Resiliency**Plus.

ResiliencyPlus is the result of a two-year participatory research process in which we interviewed over 50 civil society experts, CSO leaders, and funders around the world to try to understand what the new challenges and threats to civil society were, and then identify the new competencies and approaches that civil society needed in order to remain relevant while adapting to a new environment, resist the closing of the civic space while remaining viable, and revert this trend. In other words, why **Resiliency**Plus?

- **Context is no longer conducive for civil society participation:** the traditional Organizational Development Models and tools we born or gained traction in the mid to late nineties when the world was experiencing the third wave of democratization and the opening of civic spaces. However, in the past few years, we've come to realize that the transition to democracy was not inevitable, and we see the reemergence of authoritarian practices and regimes and the closing of the civic space and restrictions of freedoms even by democratically elected governments.

- **Organizational change management models were stale:** from our research we noticed that the traditional tools for organizational development and strengthening -from strategic planning, to making financial systems more robust- were not enough to prepare organizations to effectively respond to sudden crises, like the pandemic, and adapt successfully to more uncertain environments.

- **The new context requires a new mindset for organizations and the sector to be successful:** beyond new or updated infrastructure, knowledge, and skills -which are all important- civil society organizations can benefit from new mindsets or ways of thinking about themselves, their sector and role in it, and the context as a whole. More uncertain times and environments, like the ones we are all experiencing right now, call for adaptability, flexibility, and more horizontal and democratic leadership within organizations.

B. Introduction to ResiliencyPlus

Quick Overview

ResiliencyPlus is an all-encompassing approach to civil society strengthening that can be divided into three elements:

- **Analytical Framework:** as an analytical framework, R+ strives to shed light on the new challenges and emerging conflict dynamics that impact civil society and incentivize organizations to pause and reflect and look at their strengths and vulnerabilities through the lens of resilience instead of traditional organizational development.

- **Structured Accompaniment Process:** to operationalize the analytical framework, R+ is also a structured accompaniment and coaching process that seeks to embed systems thinking and adaptive management in the organizational culture and provide support for organizations to develop concrete strategies to prepare and respond to sudden shocks.

- **Resource Center:** to support for the analytical and the operational components, R+ is also a curated collection of diverse resources and tools to support an organization's journey to organizational resilience and long-term sustainability.

The factors of resiliency

R+ is built around seven factors and 21 associated indices of resiliency that **Partners**Global identified during the development and piloting of our model:

SITUATIONAL AWARENESS: This Resiliency Factor is based on the premise that organizations are complex systems that exist within larger, also complex, societal systems. Competency under this factor entails maintaining an awareness of the actors and dynamics at each of these levels and using that awareness to inform decision-making. This allows organizations to address threats and capitalize on opportunities. Internal Vulnerabilities Awareness, External Threats Awareness, and Systems Awareness are the three indices or building blocks of this factor.

ADAPTIVE CAPACITY: This Resiliency Factor is based on the premise that the ability to act in anticipation of or in response to threats, vulnerabilities, or opportunities within a changing civic space is essential to organizational resiliency. Competency under this factor entails building adaptive capacity by cultivating innovation, creativity, strong leadership, clear communication, positive working relationships, and a shared organizational vision. Multigenerational Leadership, Agile Governance, and Contingency Planning are the three indices or building blocks of this factor.

CONNECTEDNESS: This Resiliency Factor is based on the premise that strong organizations are purposefully and actively connected internally, with constituents, within the sector, and across sectors. This allows them to proactively manage change and build communication pathways to inform decision-making and increase preparedness. Competency under this factor entails the ability of organizations to recognize the importance of forging, maintaining, and leveraging strong relationships and alliances. It also implies the existence of practices and mechanisms that aid these efforts. Network Membership, Active Solidarity, and Collaborating to Create Shared Value are the three indices or building blocks of this factor.

ENTREPRENEURIAL MINDSET: This Resiliency Factor is based on the premise that to capitalize on new opportunities, create value, innovate, and effectively network, organizations must maintain an entrepreneurial mindset that enables access to diversified funding, strategic alliances, innovative service delivery, and quick recovery from civic space shocks. Competency in this factor entails the existence of practices and mechanisms, as well as an organizational culture, that encourages creative thinking and the exploration of nontraditional funding sources and opportunities. It also entails preparedness to sudden changes in funding patterns and donor priorities. Financial Preparedness, Experimentation and Innovation, and Diversified Revenue Streams are the three indices or building blocks of this factor.
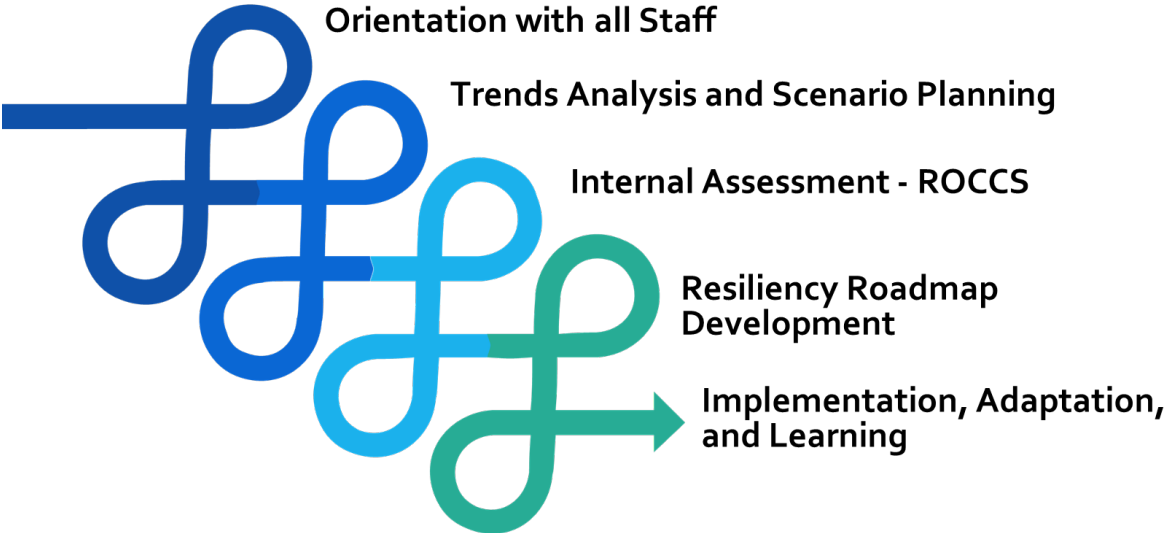
LEGITIMACY: This Resiliency Factor is based on the premise that legitimacy is needed to ensure both domestic and international public support to endure sudden changes in the civic space. Competency under this factor requires a culture and processes to ensure transparency and accountability to both donors and constituents and to build connections and trust, solidifying an organization's standing in the space. Prioritizing Accountability, Managing Public Image, and Connection with Constituents are the three indices or building blocks of this factor.

CREATIVE COMMUNICATIONS: This Resiliency Factor is based on the premise that organizations need to understand the power of intentional communications to better connect with the public and other stakeholders in the civic space. Engaging with public narratives requires a posture of curiosity to explore how others make meaning of complex issues and policies. This enables them to carefully identify narrative frames and tensions within society to communicate more effectively and adapt its communications strategies accordingly. Engaging with the Narrative, Crisis Communications, and Adopting New Technologies are the three indices or building blocks of this factor.

COMMITMENT AND CAPACITY: This Resiliency Factor is based on the premise that strong, motivated, and resilient individuals that understand and embrace the organization's mission are necessary for an organization to weather crises, survive shocks, and grow and thrive in complex and uncertain operating environments. Competency under this factor entails investing in staff preparedness and wellbeing and having in place mechanisms and practices that allow individual staff members to connect to the organization and to each other. Connection to the Work, Preparedness, and Staff Wellbeing are the three indices or building blocks of this factor.

Overview of the ResiliencyPlus Process

The R+ process is a holistic, yet flexible approach to improving an organization's level of resiliency. The process is informed by the principles and methodological approaches of scenario planning, systems thinking, and adaptive planning and implementation. It includes two levels of analysis (internal and external), the development of a series of actions that reflect the outcomes of the analyses (collectively called the Resiliency+ Roadmap), and an iterative learning implementation process that imbeds frequent and intentional ongoing reflection, assessment of the environmental dynamics, and deliberation on the way forward. This integrated process leads civil society organizations on a journey towards increased resiliency. Concretely, the current R+ Process consists of five phases:

Orientation with all Staff

Trends Analysis and Scenario Planning

Internal Assessment - ROCCS

Resiliency Roadmap Development

Implementation, Adaptation, and Learning

The following section of this guide focuses on the details and implementation approaches for the five phases of the R+ Process.

II. **THE RESILIENCY**PLUS PROCESS

A. The Orientation with the Staff – Phase 1

Purpose of an orientation with participating organizations

The Orientation Workshop is the first formal and joint space to kick-start the R+ Process with a local organization. While the structure and content of the workshop might appear simple, this is a key phase in the Process, as it seeks to: a) generate a common understanding and knowledge around the idea of civil society resilience and the core content of the R+ Framework; b) provide an overview and detailed explanations on how the R+ Process will unfold; and c) allow participating organization to begin reflecting and discussing the civic space in which the organization is operating through the lens of resilience. In other words, this is the moment where organizations get to better understand the underlying principles and our approach to resiliency, voice their questions and concerns.

Similarly, the orientation workshop is the space to set joint expectations and commitments, discuss the different roles and responsibilities of the coach or coaching team, the leadership, and the rest of the staff of the organization, and agree on a calendar and action plan to go through the R+ Process. Prior and during the orientation workshop, the coach or coaching team should highlight that participatory nature of the R+ Process and the importance of having a highly representative group -if not all- of the staff engaged in the different phases of the process.

Process Note: Convening and facilitating the orientation workshop

The orientation workshop is more a facilitated joint discussion and reflection than a lecture on the **Resiliency**Plus Framework. While we do want to increase awareness and generate common understanding and common language moving forward, the purpose of the workshop is not to "educate" or increase the knowledge of a participating organization. The purpose of the workshop is to allow an organization to *connect and start to relate* to the concepts and underlying principles of civil society resilience presented in the first section of this guide (and discussed at large in the **Resiliency**Plus Framework itself). The workshop should be a space for organizations to contextualize and give meaning to R+ and not for the coach or coaching team to force definitions or "convince" them about our approach. In this sense, the orientation workshop is organized around key reflection moments after which the coach or coaching team introduces key elements and definitions from the R+ Framework (see sample detailed agenda in Annex 1):

1) REFLECTION ON PREVIOUS RESILIENCY STRATEGIES: all organizations have varying levels of resilience and have implemented, consciously or not, different strategies and approaches that make them more resilient and have allowed them to survive in dire or turbulent environments. The first moment of the orientation workshop provides a space for participating organizations to reflect on the things they've done in the past and the threats and challenges they are anticipating or already facing. To guide the discussion, the coach can present the following questions: a) What are the organizational strategies/ practices

emerging from the response of your organization to the closing of the civic space (or to any significant event in the context) in the past year or two? And b) Which are the threats/risks your organization is facing currently or anticipates facing in the near future?

Depending on the size of the group, this can be a small group or plenary discussion. The purpose of this moment is to remind organizations that they already have certain experience in terms of resilience and that the purpose of their participation in the R+ Process is to build on those experiences to increase their preparedness and impact.

2) CONTEXTUALIZING RESILIENCY: the second moment of the workshop focuses on presenting the R+ Framework's definition of resilience, its levels, and its underlying principles (see part 1 of this guide and the R+ Framework for detailed content). It is also a moment to connect the idea of resilience and the R+ process to other complementary organizational strengthening effort that a participating organization might already know. Following a brief presentation of the definitions, the coach or coaching team should open the floor and let participants react to what was presented. To facilitate the discussion, the coach can use the following guiding questions: a) How is this definition of resiliency relevant to you and your organization? b) If not like this, how would you define resiliency based on your organizational and country contexts? c) Do you have any other examples in which your organization has demonstrated resilience based on these definitions?

3) DISCUSSION **RESILIENCY**PLUS AND THE R+ PROCESS: the third and final moment of the orientation workshop focuses on the building blocks of the R+ Framework and the logic/sequencing of the R+ Process. The coach or coaching team should refer to the R+ Framework and to section 1 of this guide to present **Resiliency**Plus as a Framework, a Structured Accompaniment Process, and a Resource Center and to showcase the 7 Resiliency Factors and 21 Resiliency Indices or subfactors. Similar to the previous moments of the workshop, coaches should provide dedicated discussion and reflection spaces. For example, after presenting the Resiliency Factors and Indices, participants could have dedicated time to reflect on specific internal and external challenges that they have faced in the past and try to categorize them under the factors and indices of R+. The coach should also provide an overview of each of the phases of the R+ Process and the tools and methodologies to be utilized in each phase.

4) NEXT STEPS: The coach or coaching team and the organization should spend developing a draft timeframe/calendar for each one of the phases. Additionally, the organization should name a steward that, together with the Executive Director or Leadership team, will serve as the main point of contact for scheduling and other logistical matters.

B. The Civic Space Ecosystem Analysis – Phase 2

Introduction to Trends Analysis and Scenario Planning

The ecosystem in which organizations operate is chaotic and turbulent. This intrinsic complexity and uncertainty can be best understood from the perspective of multiple and plausible futures. In response to this, the R+ process incorporates a trends analysis and scenario planning to encourage participating organizations to intentionally look at the future and prepare for with might lay ahead.

Looking ahead and trying to anticipate what may come gives organizations an advantage, as it increases their preparedness to change. Understanding how things may unfold can allow organizations to "rearrange the pieces of the puzzle that make up the present".

> **"The purpose of looking at the future is to disrupt the present"**
> *– Gaston Berger, French Futurist*

As part of this Phase of the R+ Process, coaches facilitate a series of joint (if there are several organizations going to the R+ Process) or individual workshops with the purpose of incentivizing organizations to explore and have a new understanding of their operating environment through scenario planning and trends analysis to better manage volatility, uncertainty, complexity, and ambiguity and inform strategic decisions at the level of the organization.

> *Trends Analysis*: an approach to context analysis that focuses on collecting and comparing data/information to try to identify patterns in the different events that take place in a given context.
>
> *Scenario Planning*: an approach and a tool designed to surface multiple perspectives about concerns and uncertainties in the environment and map out the complexity of the future and its possible outcomes.

Process Note: Facilitating a Trends Analysis and Scenario Planning Exercise

The civic space ecosystem analysis is built around the question, "Which forces and capacities (and what are the dynamics among them) make civil society resilient and able to participate openly and freely in civic life?" Organizations begin to answer this question by exploring the civic space context and its factors related to history that shape the current norms and behaviors, institutions and laws governing civic space, culture and values of a society, and other dimensions that impact and/or influence civic space (e.g., socio-economic factors, communications and technology, and security). This draws heavily on the categories found within a political economy analysis, as well as the threats identified in the R+ framework.

Concretely, this phase of the R+ Process consists of a multi-day facilitated brainstorming and analysis workshop divided into three key moments:

1) DEFINING THE FOCAL ISSUE(S): the focal issue or issues can be translated or explained as that what the organization needs to better understand and further explore in order to be better prepared for the future (i.e., what would the organization like to better understand to make sure they remain relevant; what is the organization curious about?).

2) IDENTIFYING AND PRIORITIZING TRENDS: once the organization has identified their focal issue or issues, the second moment of the workshop focuses on identifying and prioritizing the political, economic, social, technological, environmental, and legal trends that impact or can influence the focal issues.

P	E	S	T	E	L
political	**economic**	**social**	**technological**	**environmental**	**legal**
•political shifts •government policies •political stability •corruption •tax policy •trade restriction •government policy toward CSOs	•economic situation and shifts of the country •unemployment •foreign help to the country/ civil society •economic consequences of Covid 19 pandemia •government support to CSOs - financial •government contracting of CSOs for public services •philanthropy - giving by companies and individuals	•social trends •population growth rate •demographics •cultural aspects of your country •social attitudes towards your clients/beneficiaries •social attitudes and values related your mission and values •minorities situation in the country •migration/ brain drain •interactions/hate on social media •social situation of your clients/beneficiaries/ constituencies/ •preferences of your stakeholders •social consequences of Covid 19 pandemic	•technological innovations related to your field of work •communication and new media •security threats related to technology/ social media etc. •changes in technological demands of your work •trends in science	•climate/ climate change •environmental policies •environmental demands on your work •ecological changes and it's implications on society •movements in environmental field •	•legislations regulating CSOs •legislation regulating financing of CSOs (e.g., from abroad) •health and safety laws •measures related to COVID 19 pandemic •copyright law/ protection of intellectual property •anti-discrimination laws

3) SCENARIO PLANNING: for the third moment of the workshop, participants should use two trends to build a Scenario Planning Matrix (see below). To do this, participants need to determine both the best- and worst-case scenarios for each of the trends they identified in the previous step and then describe each of the four possible futures or worlds based on the trends (e.g., how does the world look like if we are in the best-case scenarios for trend 1 and 2? How does it look like if we are in the worst-case scenario for trend 1, but in the best-case scenario for trend 2? And so on).

Sample Scenario Planning Matrix
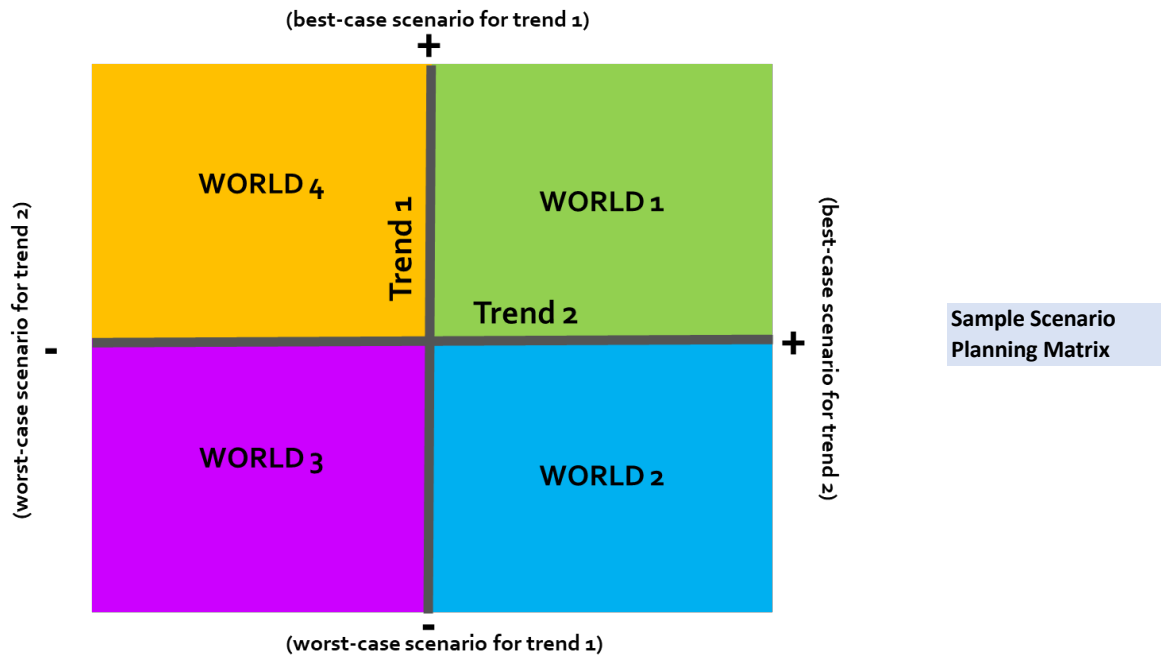
Participants can build as many matrices as they desire to accommodate the different prioritized trends. Once participants have described the four possible worlds/futures in the matrix, the coach should facilitate a plenary discussion around the following two questions: a) how does the organization need to change under each possible world to remain relevant? And b) what should the civil society sector do differently to increase its impact and relevance under the different scenarios/possible worlds?

To capture all the information from the discussions on focal issues, trends, and scenarios, coaches should use the Civic Space Ecosystem Analysis Worksheet included as Annex 2. Additionally, a sample detailed agenda for the workshop with additional prompts, instructions, and guiding questions can be found in Annex 3.

C. The Resilient Organization in Changing Civic Spaces (ROCCS) Assessment – Phase 3

Introduction to the ROCCS Assessment

As we mentioned in section 1, **Partners**Global R+ Framework defines **resiliency** as the ability of an organization to adapt swiftly and purposefully to sudden changes or shocks to the civic space and its operating environment in such a way as to not only survive, but also thrive in uncertain environments.

The ROCCS Assessment is phase 3 of the R+ Framework. It tests the perceptions of staff regarding key organizational vulnerabilities and strengths that can contribute or hinder the organization's ability to survive and operate in the face of changing civic spaces. This phase consists of an anonymous and individual *self-assessment tool* in the form of a perceptions survey and a *facilitated reflection workshop* around the findings from the self-assessment.

Through the ROCCS Assessment (both the survey and the follow-up reflection workshop), organizations can gain insights into potential internal vulnerabilities that may make them susceptible to external threats in their operating environment. They can also discover strengths that, if leveraged appropriately, can enhance their resiliency, and increase their impact even in the most challenging environments. In a nutshell, this phase reveals an organization's capacity and ability to plan for, respond to, and recover from changes in civic space.

It is important to highlight that the ROCCS is not intended to serve as a baseline or an objective evaluation of the organization's capacities, but rather as an opportunity for joint reflection and discussion amongst staff and the Resiliency Coaching Team. The findings will be a key input, but not the only one, into a participating organization's Resiliency Roadmap.

Structure of the Self-Assessment Tool

The ROCCS self-assessment tool is primarily a perceptions survey on the 7 Resiliency Factors and 21 Resiliency Indices:

FACTOR	INDICES		
Situational Awareness	Internal Vulnerabilities Awareness	External Threats Awareness	Systems Awareness
Adaptive Capacity	Multigenerational Leadership	Agile Governance	Contingency Planning
Connectedness	Network Membership	Active Solidarity	Collaborating to Create Shared Value
Entrepreneurial Mindset	Financial Preparedness	Experimentation and Innovation	Diversified Revenue Streams
Legitimacy	Prioritizing Accountability	Managing Public Image	Connection with Constituents
Creative Communications	Engaging with the Narrative	Crisis Communications	Adopting New Technologies
Commitment and Capacity	Connection to Work	Preparedness	Staff Wellbeing

Multiple individuals, ideally from different levels and areas within an organization, must complete the ROCCS self-assessment to try to accurately reflect its state of resiliency. The ROCCS asks respondents to rate a series of statements on a 1-4 scale. Some statements on the ROCCS refer to the existence of specific processes or systems within an organization (e.g., "Our organization has a formal process of soliciting feedback from key stakeholders"), whereas others may refer to the subjective perceptions of respondents (e.g., "I believe contingency planning is valued within my organization"). In instances where a respondent does not have enough information to respond to a statement or feels unable to provide an informed opinion regarding a subjective statement, they can select the option "I don't know/does not apply".

Facilitated Reflection Workshop

As mentioned above, apart from the self-assessment tool, the ROCCS assessment also includes a facilitated workshop for respondents of the survey and other staff members of a participating organization to reflect on the findings from the survey, confirm their validity, and discuss their significance and priority level. This workshop provides everyone in the organization with the opportunity to challenge, better understand, refine, and eventually validate the results, as well as determine the key areas or priorities on which they wish to focus in their Resiliency Roadmap. Details on how to convene and facilitated this workshop are provided below.

Process Note: Setting up the ROCCS Assessment, analyzing the data, and validating the results

The current version of the ROCCS consists of 84 questions (four questions for each one of the 21 Resiliency Indices). The Microsoft Word version of the ROCCS Assessment (which includes the definitions of each factor and index, as well as the specific questions under each index) can be found in Annex 4.

To set up the ROCCS survey, coaches can use any surveying platform of their choice. We recommend Google Forms or Qualtrics, as both are user-friendly and provide summarized analyses of key findings such as variance in the responses.

ROCCS Assessment View in Qualtrics

ROCCS Assessment View in Google Forms

Once the survey is set up on an online platform, coaches should distribute the link/access details and provide between 3 to 7 days for staff members of the participating organization to complete. *When distributing the link to the survey, coaches must highlight that the individual answers will be confidential and that respondents should answer as truthfully as possible.*

Once the respondents from an organization have completed the survey, the coach needs to process the results and create an "organizational heatmap" averaging the scores (see scale in

example) from all participants into one visual (any responses marked as I don't know/does not apply, do not factor into this average). Individual responses are not shared to maintain the confidentiality of individual staff members.

FACTOR	INDEX		
Situational Awareness (avg. 3.2)	Internal Vulnerabilities Awareness (2.9)	External Threats Awareness (3.1)	Systems Awareness (3.5)
Adaptive Capacity (avg. 3.0)	Multigenerational Leadership (2.9)	Agile Governance (3.3)	Contingency Planning (2.7)
Connectedness (avg. 3.3)	Network Membership (3.4)	Active Solidarity (3.2)	Collaborating to Create Shared Value (3.4)
Entrepreneurial Mindset (avg. 2.9)	Financial Preparedness (2.6)	Experimentation and Innovation (2.8)	Diversified Revenue Streams (3.3)
Legitimacy (avg. 3.4)	Prioritizing Accountability (3.3)	Managing Public Image (3.6)	Connection with Constituents (3.1)
Creative Communications (avg. 3.2)	Engaging with the Narrative (3.1)	Crisis Communications (3.3)	Adopting New Technologies (3.2)
Commitment and Capacity (avg. 2.8)	Connection to Work (3.3)	Preparedness (2.5)	Staff Wellbeing (2.5)

Sample Heatmap

3.6 – 4.0	
3.1 – 3.5	
2.6 – 3.0	
2.1 – 2.5	
1.6 – 2.0	
1.0 - 1.5	

Annex 5 provides an Excel template for coaches to calculate the scores and produce the heatmap.

Prior to the *facilitated reflection workshop*, the coach should produce a comprehensive report (see sample in Annex 6) that includes, apart from the organizational heatmap, two things: a) detailed analysis for each Resiliency Factor; and b) an overview of the variance between respondents. Variance is the measurement to assess how big, or small, are the differences between perceptions (e.g., did a Resiliency Index get a score of 3.0 because all respondents gave it that score? Or is it because half of the respondents gave it a score of 4 and the other half gave it a score of 2?). Variance is key and higher variances should be discussed during the reflection workshop and validation of results. Below is a sample on how coaches can present the detailed results in the comprehensive report:

SITUATIONAL AWARENESS

This Resiliency Factor is based on the premise that organizations are complex systems that exist within larger, also complex, societal systems. Competency under this factor entails maintaining an awareness of the actors and dynamics at each of these levels and using that awareness to inform decision-making. This allows organizations to address threats and capitalize on opportunities.

				3.6 – 4.0	
				3.1 – 3.5	
				2.6 – 3.0	
				2.1 – 2.5	
				1.6 – 2.0	
				1.0 - 1.5	

| FACTOR	INDEX		
Situational Awareness (avg. 3.2)	**Internal Vulnerabilities Awareness (2.9)**	**External Threats Awareness (3.1)**	**Systems Awareness (3.5)**

Under the *Internal Vulnerabilities Awareness* section, the ROCCS looks at the organization's ability to address, discuss, and identify its own weaknesses. The ROCCS measures the existence and promotion of a culture of organizational self-reflection to identify weaknesses and internal challenges. It also looks at the existence of dedicated spaces or mechanisms for staff to share and discuss how the civic space and its changing nature affects them. The specific questions used in this section are:

1. Our organization periodically assesses its internal organizational capacities and vulnerabilities as they relate to the changing external context.
2. Our organizational takes into account the inputs of staff at all levels when the organization is confronting challenges.
3. The staff (including myself) feel comfortable talking about internal vulnerabilities or weaknesses with our peers and with leadership.
4. Our organization has a formal process of soliciting feedback from key external stakeholders (such as constituents, donors, other organizations, etc.) to identify and address any internal weaknesses.

For this section, the average score was 2.9. While this is not necessarily a bad score, it does show that participants in the ROCCS believe that [organization] could be better equipped to conduct timely, relevant, and comprehensive analyses of its operating environment and the broader civic space. When looking at the individual answers to the ROCCS, we saw that the staff feel comfortable talking about internal vulnerabilities or weaknesses with their peers and with leadership. We also saw that leadership is very open towards the rest of the staff and consistently shares their own analyses and discussions on the external operating environment to keep the staff aware and ready. However, what lowered the score was the perception of some of the respondents that the organization does not have a formal process of soliciting feedback from key external stakeholders (such as constituents, donors, other organizations, etc.) to identify and address any internal weaknesses.
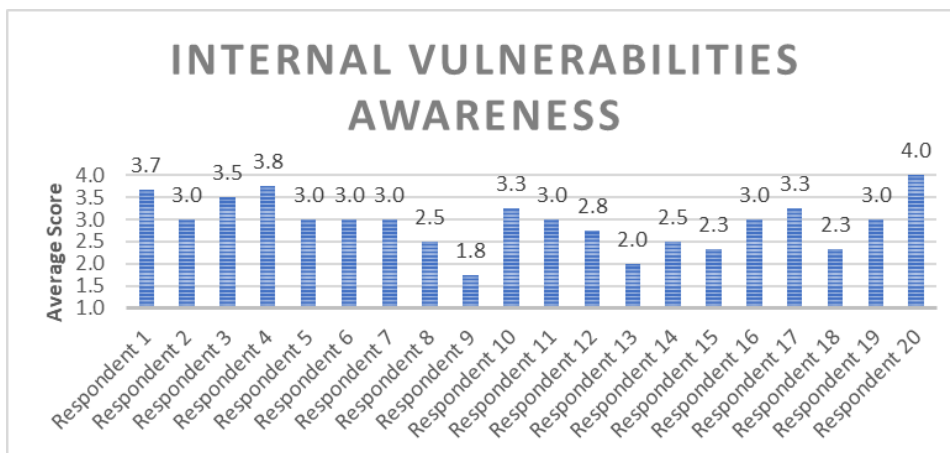
The facilitated reflection workshop is the space for participants to see the results, discuss them as a team, refine or validate them, and prioritize the areas they want to improve. During this

workshop, it is important to revisit the findings from the Civic Space Ecosystem Analysis described before and ask participants to discuss whether these findings (or the prioritization) might change in the different scenarios.

In general, the ROCCS validation workshop is divided into three main moments:

1) PRESENTATION: the first moment of the workshop consists of the formal presentation of the summary findings from the report. The coach or coaching team should give a brief introduction to the ROCCS Self-Assessment tool, present the organizational heatmap, as well as some key highlights (highest and lowest scoring factors and indices).
2) ACCURACY: the second moment of the workshop consists of an open discussion between the organization's team regarding the findings. Concretely, the discussion should focus on two questions: a) are these findings accurate? b) do these findings reflect the situation of our organization today? The purpose of this discussion is to validate the accuracy of the findings before moving into a prioritization exercise.

3) SIGNIFICANCE: the third and final moment of the workshop should be centered on the importance and significance of the Resiliency Factors and Indices for the organization in its current context and situation. Concretely, the discussions during this moment should focus on three guiding questions: a) which of these factors and indices are important to your organization and why? b) What will strengthening these indices do for the organization? And c) Given the current context (represented by the findings from the trends analysis and scenario planning exercise in Phase 2) and state of the organization, which of the indices should be prioritized.

A detailed sample agenda with additional prompts, instructions, and guiding questions for this workshop can be found in Annex 7. Following the validation and prioritization of the results, the coach should update the comprehensive report by adding a final section with the conclusions from the workshop and the next steps.

D. The Resiliency Roadmap Development – Phase 4

Introduction to the Resiliency Roadmap

Equipped with a clear understanding of the current civic space ecosystem, the alternate scenarios and the potential impacts that those present to an organization, and its own internal vulnerabilities and strengths, the next phase of the R+ Process is to devise a Resiliency Roadmap. Different from a traditional planning process, the Resiliency Roadmap Development focuses an organization's efforts to identify the most appropriate short-term actions and benchmarks that prepare it for the current and potential impacts identified in the previous steps. By the end of the development process, organizations will be ready to put the roadmap into action.

The Resiliency Roadmap presents the key short and mid-term strategies and actions that a participating organization has identified and agreed to implement to increase its organizational

resilience to changes in the civic space and sudden shocks to its operating environment. These strategies and actions are the result of a co-creation process facilitated by the coach.

Structure of the Resiliency Roadmap

The Resiliency Roadmap is the key output from the R+ Process, as it represents the culmination of the analysis and design phases and sets the guidelines for the implementation phase of the process. The document itself should include: a) a brief introduction on the document and how it was constructed (detailing who from the organization participated, when the co-creation process took place, etc.); b) a summary of the priority areas selected by the organization during the ROCCS results validation workshop; c) detailed priority improvements and strategic changes the organization will undertake; and d) roles, responsibilities and timeframes for implementation. The core of the Resiliency Roadmap are the *priority improvements and strategic changes.* These are organized under four general categories:

- INFRASTRUCTURE: Tangible/intangible things that the organization needs to achieve the improvement. E.G., internal policies and procedures, equipment, supplies.

- KNOWLEDGE: Information that the organization needs to have in order to achieve the improvement. E.G., a new law or regulation; tax implications for selling services; etc.

- SKILLS: Capabilities that the staff need to develop or strengthen to achieve the priority improvement. E.G., how to pitch the organization's work to a corporate sponsor; how to use a specific technology to engage with the organization's constituents; etc.

- MINDSET: Changes in terms of behavior/the way an organization approaches its work. E.G., all staff understanding that fundraising is not exclusive to the Business Development unit.

PRIORITY IMPROVEMENT #1		RESILIENCY INDICES	
[TITLE AND VISION STATEMENT]		•	
STRATEGIC CHANGES		SPECIFIC ACTIONS	
INFRASTRUCTURE			
KNOWLEDGE			
SKILLS			
MINDSET			

Sample Priority improvement Matrix

Process Note: Co-Developing de Resiliency Roadmap

The development of the Resiliency Roadmap is a facilitated participatory process guided by the coach or coaching team. This process is as follows:

1) VISIONING or imagining the ideal state of the organization under each one of the prioritized vulnerable areas/factors. This collective visioning moment will serve as the "north star" to guide the brainstorming of specific priority improvements and strategic changes that the organization will undertake.

2) BRAINSTORMING AND PRIORITIZING quick, effective actions for each scenario to improve organizational resiliency. Organizations will look at the current ecosystem and the top most likely scenarios and think through potential short and mid-term actions that the organization might want to consider taking to increase their ability to prepare for and adapt to potential impacts At this stage, organizations can reference the outcomes of ROCCS assessment that identify strengths and vulnerabilities of the organization, as the actions identified could build capacity of a weakness or leverage a strength to the organization's advantage.

3) IDENTIFYING MILESTONES that capture the most immediate step in the actions. Milestones are the higher-level indicators or benchmarks of progress towards the end state of the entire action. The milestones will also be the point at which the organizations pause to reflect on lessons, promising developments, and challenges.

4) DIVISING MINI-ACTION PLANS to help reach milestone. Plans for the first milestone of the actions should include a timeframe for completion (should be short), who is the point of contact/team responsible for tracking and/or implementing the milestone, and any external resources needed

A detailed sample agenda can be found in Annex 8.

E. Implementation, Adaptation, and Learning – Phase 5

Implementing the Resiliency Roadmap and Capturing Lessons

With the Resiliency Roadmap complete, organizations may now begin to implement the strategic changes and actions with the ongoing accompaniment and mentorship of the coach. As mentioned in section 1 of this guide and further detailed in the R+ Framework, the essence of organizational resiliency is an ability to anticipate and adapt swiftly to changing circumstances, in a manner that enables the organization to continue to function - and even thrive. The R+ Process, therefore, intentionally includes iteration and adaptation through ongoing assessment and monitoring of the contextual and internal dynamics, evaluation of action plan progress and accomplishments, and learning what works well and what needs to change.

Monitoring is critical to anticipating changes and reducing uncertainty or risks in a civic space environment and improves our understanding over time of the system in which civil society organizations operate. Capturing ongoing results of monitoring can be used to make minor tweaks (or major changes) to a plan as it is being implemented by including feedback loops to ensure that organizations have time to develop appropriate responses, or to alter plans or practices accordingly

Process Note: Coaching and ongoing accompaniment

As stated above, once the organization starts to implement their Resiliency Roadmap, the coach or coaching team should hold periodic, semi-structured check-ins with the leadership and the steward of the R+ Process. Using the Roadmap as the guiding document, during these check-ins, the coach can use the following questions to structure the conversation:

- What has been accomplished? What progress has been made against the agreed upon benchmarks?

- What changes, if any, occurred internally within the organization? Are there any new areas of resiliency that requires attention in order to address any emerging internal vulnerabilities?

- What changes, if any, occurred in the context and what are the impacts or consequences of those changes on the roadmap?

- What have you learned? What did you find challenging? What worked and what didn't work?

- What's next? How should we move forward? Possibly revisit some of the alternative options identified in the previous phase

The coach should keep detailed notes of this conversation and agree on next steps after each check in.