

Identifying key relationships

INTRODUCTION

A number of relationships with individual people are key to the success of your work to improve outcomes for students (your delivery effort). In this exercise participants identify which specific relationships these are, use a color-rating system to evaluate the current status of these relationships, and think through the actions needed to build space for these relationships so they have the best chance of being successful.

The overall goal of this exercise is for the group of participants to identify a manageable list of the most critical relationships, so the team can focus their efforts – not conduct an audit of all the individual work relationships each participant has (although they could use the same tools to do that individually if they wanted).

A key point to remember in the first part of this exercise is that you are building a list of critical relationships that you need to build and maintain – some of them may not exist yet. Information you have already captured as part of your delivery effort may provide useful background material for this exercise. For example:

- Your guiding coalition (see [element 1D](#))
- Delivery chains (see [element 3B](#))
- Outputs from problem-solving exercises (see [element 4B](#))
- Individual people with the ability to influence priority audiences identified through stakeholder mapping (see [element 5B](#))

This exercise is designed for a small group of around six participants or fewer. Because this exercise involves the discussion of relationships with named individuals, there is an inherent degree of sensitivity, and we recommend that you only conduct this exercise with team members that know and trust each other.

OBJECTIVES

- Identify the individual relationships that are critical to the success of your delivery effort
- Evaluate the nature and quality of those relationships
- Identify the actions needed to build space for these relationships

MATERIALS NEEDED

- Markers
- Handout on page 3 for each participant
- Recreate the template on page 4 and post on the wall. You can do this by printing a large version of page 4 and hanging that on the wall, or by recreating the template on a dry erase board, flip chart paper, EDI’s signature “brown paper” or in a pinch projection of a computer screen. However you create this, it needs to be visible to the entire group and easy to change and add to.
- Rather than writing directly on the template you’ve created, you’ll need to use small, repositionable cards. These cards can be just small pieces of paper, index cards or Post-Its, and there are a number of ways to make sure they are repositionable. If on a dry erase board, you could use magnets to hold cards in place, and on other surfaces, you could use sticky tack or spray-on adhesive – whatever won’t damage your wall.

**INSTRUCTIONS**

Time	Exercise instructions	Facilitator notes	Materials
15 minutes	<ul style="list-style-type: none"> ■ Individually: <ul style="list-style-type: none"> – Look at the "relationship" questions on the handout and write on cards the names of people you think meet one or more of these criteria (one post it each). – Place cards on the template. ■ As a group, discuss the relationships identified and record in the relationship column of the template poster. 	<ul style="list-style-type: none"> ■ Remind participants that this is about identifying the relationships that need to be strong for the delivery effort to succeed – even if they are currently poor or non-existent. ■ As participants place cards on the template, group them so that it is clear where several people have identified the same relationship (these are likely the most critical). ■ In order to get a manageable list of relationships to discuss, check that there is broad consensus for including the names you're recording on the poster. 	<ul style="list-style-type: none"> ■ Handouts for each participant ■ Cards ■ Markers ■ Template
45 minutes	<p>As a group:</p> <ul style="list-style-type: none"> ■ Go down the list of relationships and use the criteria in the handout to rate the "current status" of each; record on the poster. ■ Starting with the "red-rated" relationships, discuss and capture on the poster: <ul style="list-style-type: none"> – Current interactions with this person – Actions needed to build space for the relationship. ■ Use the questions in the handout to guide your discussion. ■ Repeat the process for the "amber red-rated" relationships and so on. 	<ul style="list-style-type: none"> ■ The color rating is a non-scientific "gut-check" – surface any major disagreements within the group and move to a consensus rating that participants can "live with". ■ Push for specific actions, with an owner (from within the group) and a timeline for each ■ It's ok to spend less time on the "green-rated" relationships – it might be that these relationships already have "enough space," and just need to be maintained. 	<ul style="list-style-type: none"> ■ Colored markers ■ Template ■ Handouts

**HANDOUT: IDENTIFYING KEY RELATIONSHIPS**

Relationship	<ul style="list-style-type: none"> ■ Is this person a key decision-maker as regards one or more aspects of your work? ■ Do they have access to a resource that you need (e.g. money, expertise, authority, leaders' time, communication vehicle)? ■ Are they an important link in the delivery chain (e.g. a gatekeeper or a choke point)? ■ Do they lead a high-priority group of stakeholders? ■ Do they have influence on others who have these characteristics?
Current status (R, AR, AG, G)	<ul style="list-style-type: none"> ■ Red = relationship is non-existent or antagonistic, and this is obstructing or damaging the delivery effort or one of the main strategies ■ Amber red = mixed; closer to red than green ■ Amber green = mixed; closer to green than red ■ Green = relationship is strong, reliable, and is helping advance the delivery effort
Current interactions	<ul style="list-style-type: none"> ■ How often do you see this person? ■ In what context (e.g. regular formal meetings, occasional formal meetings, chance interactions, informal/social interactions)? ■ Do you accomplish what you need to in these interactions to build/maintain a strong relationship with this person and advance the delivery effort?
Action to build space (What? Who? When?)	<ul style="list-style-type: none"> ■ Do you need to create other/better opportunities to interact with this person? ■ What is/are the best way(s) to do this? <ul style="list-style-type: none"> – Make better use of an existing interaction? Which one? – Schedule/engineer a new type of interaction? What kind (e.g. regular formal meetings, occasional formal meetings, chance interactions, informal/social interactions)? ■ Who in the team (name them) needs to do what, by when (or with what frequency) to make this happen?



TEMPLATE: IDENTIFYING KEY RELATIONSHIPS

Relationship	Current status (R, A/R, A/G, G)	Current interactions	Action to build space (What? Who? By when?)