CIVIL SOCIETY ORGANIZATIONS: TOWARDS SYSTEMIC ENGAGEMENT AND CONNECTION

USAID / MEXICO'S CIVIL SOCIETY ACTIVITY

This document is part of a collection of strategic documents developed by the Civil Society Activity (CSA), implemented by Social Impact, Inc. and financed by the United States Agency for International Development (USAID). The texts that comprise the collection describe the systemic capacity development approach and methodology that the Civil Society Activity designed to accompany more than forty civil society organizations in institutional strengthening, grants management, and legal compliance. This paper analyzes how organizations connect with each other across several dimensions of engagement and connection while concurrently developing a higher degree of organizational maturity. This inter-relationship is explored through the lens of USAID's "5 R's Framework"[1] which provides insight on how to target capacity development efforts in order to promote systemic engagement. The full CSA compendium is a useful resource for strengthening civil society organizations. You may reference the full collection at Social Impact's website, https://socialimpact.com/.

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[1] The 5 Rs in USAID's Local Systems framework are: Results, Roles, Relationships, Rules and Resources

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ABOUT USAID/MEXICO'S CIVIL SOCIETY ACTIVITY

The Mexico Civil Society Activity (CSA) was a 4-year program funded by USAID's bilateral mission in Mexico (USAID/Mexico). CSA aimed to improve the sustainability of Civil Society Organizations (CSOs) to effectively implement their agendas on violence prevention, human rights protection and justice reform in Mexico. To this end, CSA focused on improving CSOs' capacity to communicate and work collaboratively, increasing their connections with key stakeholders, strengthening their capacity to develop strategies that respond to their changing environment and to their communities' needs and priorities, and improving CSO access to knowledge and resources. Social Impact (SI) Inc. implemented the Civil Society Activity in partnership with Fundación Appleseed.

ABOUT SOCIAL IMPACT

Social Impact (SI) is a management consulting firm that provides monitoring, evaluation, strategic planning, performance management and capacity building services to advance development effectiveness. SI's work helps to reduce poverty, improve health and education, promote peace and democratic governance, foster economic growth, and protect the environment. To achieve this, SI delivers consulting, technical assistance, and training services to government agencies, nongovernmental organizations, and foundations.

ACKNOWLEDGMENTS

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ACRONYMS

CD 2.0	Capacity 2.0
CLA	Collaborating, Learning and Adapting
CSA	Civil Society Activity
CSO	Civil Society Organization
COVID-19	Corona Virus Disease 2019
Fortalecedoras	Intermediary Support Organization
ISO	Intermediate Support Organization
J2SR	Journey to Self-Reliance
OPI	Organizational Performance Index
SI	Social Impact
5Rs	USAID's 5R Framework (Results, Roles, Relationships, Rules and Resources)
USAID	United States Agency for International Development

EXECUTIVE SUMMARY

This paper analyzes how and why organizations connect with each other across several dimensions of engagement and connection. The conceptual approach that informs this document draws upon USAID's Capacity 2.0[2] and the 5 Rs[3] Framework, which is aligned with the Civil Society Activity's (CSA) approach to capacity development. Driven by the Capacity 2.0 model's focus on the full context in which capacity development occurs in order to use a "best fit" approach, this paper considers CSOs' level of organizational maturity. Throughout the analysis, this document focuses on various *dimensions* of engagement and inter-relationship, referring to the many connections and types of collaboration that organizations have within their local systems, in line with USAID's 5 Rs Framework.[4] CSA has found that adopting both Capacity 2.0 and the 5 Rs Framework enables organizations to better analyze the local systems in which they operate and how their respective roles influence how they develop their core work and interact within their local context. This conceptual and analytical framework is useful to understand how organizational change can contribute to transformation, ultimately allowing CSOs to mature as organizations and increase the sustainability of their results.

Throughout this document, four dimensions are described, each of which relates to the level and characteristics of CSO connections. The first dimension corresponds to organizations' internal focus, referring to connections that are locally oriented and intended to advance their mission, vision, and values through the identification of constituents and local stakeholders who support their specific social cause. The second dimension refers to the collective focus of organizations in which CSOs see themselves as part of a larger group of allied organizations that pursue similar interests and social causes. The third dimension is sectoral, where organizations prioritize their connections to other heterogeneous organizations that are members of the civil society sector, regardless of whether they have different social agendas. The fourth dimension, that of the system, refers to the ways in which organizations aim to connect with diverse actors, including from the public and private sectors, to better influence the system and achieve their missions and collective agendas more sustainably in a collaborative fashion (Local Systems Approach USAID).[5]

CSA has observed complex dynamics among these dimensions: As organizations evolve towards maturity through their organizational development and strengthening of their

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[2] USAID. (2017). Capacity 2.0. Accessed on July 27, 2020. https://usaidlearninglab.org/library/capacity-20
[3] The 5 Rs framework takes into account the various actors that participate in the local systems in which CSOs participate, as well as their Role, Relationships, Resources, Rules, Results.
USAID (2016). The 5Rs Framework in the Program Cycle. Technical Note. Accessed at
https://usaidlearninglab.org/sites/default/files/resource/files/5rs_techncial_note_ver_2_1_final.pdf on 06.27.20.
[4] USAID. (2014). Local Systems: A Framework for Supporting Sustained Development, Accessed at
https://www.usaid.gov/policy/local-systems-framework on 06.30.20.
[5] USAID. (2014). Local Systems: A Framework for Supporting Sustained Development, Accessed at
https://www.usaid.gov/policy/local-systems-framework on 06.20.20.

internal systems and performance, they relate to other stakeholders in the other dimensions, incrementally progressing to systemic interactions. Conversely, as organizations transition through the dimensions, they are also prone to reach higher levels of organizational maturity.

Finally, this paper provides recommendations on how these various types of interaction form constellations of networks that are characterized by different forms of collaboration and connection across the four dimensions. These new ways of working and collaborating extend the influence of the civil society sector, especially in the case of the systemic dimension, which promotes greater connectivity and a more hospitable operating environment in which to achieve sustainable development results. The paper concludes with CSA's lessons learned in implementing its capacity development approach,[6] as well as additional recommendations for the application of this approach.

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[6] For more information on CSA's capacity development approach, please consult the document *Civil Society Activity*'s *Systemic Approach to Capacity Development*, which is also included in CSA's Legacy Compendium.
USAID Mexico Civil Society Activity. Fischer, Brandon. (2020). *Civil Society Activity's Systemic Approach to Capacity Development.*

BACKGROUND AND INTRODUCTION

The objective of USAID/Mexico's Civil Society Activity (CSA) was to improve the sustainability of Mexican Civil Society Organizations (CSOs) so they would more effectively implement their agendas on violence prevention, human rights protection, and justice. Over four years, CSO improved the capacity of CSOs to communicate and work collaboratively, increasing the connections between CSOs and key stakeholders, strengthening the capacity of CSOs to develop strategies that respond to their environment, and improving their access to knowledge and resources. Figure 1 illustrates CSA's strategy.

Figure 1. Civil Society Activity's Strategy

When organizations work together, they accomplish more, learn more, and have more opportunities to achieve impact. However, given the diversity of its partner organizations, CSA understood the challenges of nurturing connections and engagement incrementally among multiple CSOs and key stakeholders. Thus, CSA took time to pause, reflect,[7] and ask: "While implementing a capacity development program with a systemic approach, how can CSA better understand and respond to what triggers CSOs' collective work? How can we leverage the opportunities that greater engagement and connection provide for systemic change? Where do we begin and what kind of realistic outcome can we expect?"

This paper synthesizes answers derived from CSA's work with its partners. It provides examples of how to identify organizations' stage of organizational development and the dimension(s) in which they interact with other actors in their local systems. Aligned with the 5 Rs Framework, connections among CSOs and other actors within each dimension are characterized by the organization's roles, relationships, results, resources and rules (5Rs

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[7] USAID, Learning Lab, Collaboration Learning and Adaptation CLA Framework and Key Concepts. Accessed from https://usaidlearninglab.org/sites/default/files/resource/files/keyconcepts_twopager_8.5x11_v7_20160907.pdf on 06.11.2020.

Framework).[8] The paper then analyzes the extent to which these interactions are purposeful and intended to achieve systemic impact. The aim of this analysis is to validate a framework for tracking CSO capacity development across four dimensions, so that strengthening interventions extend beyond the findings of organizational capacity assessments. This broader framework privileges CSO approaches to strengthen and increase their attention to the various dimensions, thus becoming more mature, improving their performance, and making them more capable of influencing local systems. Though progress across the four dimensions requires organizational transformation and evolution, this process provides CSOs with the tools to more effectively carry out their missions and enhance their sustainability.

Importantly, the organizational transformation process usually begins with the internal dimension: Strategic Plans and effective decision-making processes and structures that are informed by evidence are vital to achieving greater connections and collaboration. Likewise, Strategic Alliance plans require mapping stakeholders within and beyond the civil society sector, who will help advance organizational missions and cross-sectoral collaboration, and ultimately, develop the local system.

THE FOUR DIMENSIONS OF CSO ENGAGEMENT AND CONNECTION

When determining the degree of engagement and connection of CSOs, Arnaud Sales and other scholars have provided different propositions about the dimensions in which organizations perform their activities. Sales refers to the private and public spheres as dimensions where CSOs interact.[9] He also references the two poles in which actors interact within a system, the individual and the systemic. Veltmeyer provides another view: According to Veltmeyer, if CSOs' agendas have an international development approach, they often tackle issues from a perspective that is informed by outside influence to affect local conditions, whereas organizations that work at local levels tend to work from an internal to an external perspective.[10] The approach of Fioramonti and Finn Heinrich considers CSO interaction in the public arena, through advocacy and policy making

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[8] USAID (2016). The 5Rs Framework in the Program Cycle. Technical Note. Accessed at https://usaidlearninglab.org/sites/default/files/resource/files/5rs_techncial_note_ver_2_1_final.pdf on 06.27.20.
[9] Sales, A. (1991). The Private, the Public and Civil Society: Social Dimensions and Power Structures. International Political Science Review / Revue Internationale De Science Politique, vol. 12, no. 4. JSTOR. Accessed at www.jstor.org/stable/1601467 , 12(4), 295–312, on 06.20.20.
[10] Veltmeyer, H. (2008). Civil Society and Local Development. Interações (Campo Grande) SciELO International Conference, 9(2), 229-243. Accessed at https://www.scielo.br/scielo.php?script=sci_arttext&pid=S1518-70122008000200010, on 06.20.20.

influence, as crucial for their long-term sustainability.[11] In the Mexican context, these various realms are part of an ongoing analysis of CSO interaction in a larger system, which is still in the process of definition.[12]

Based on these theoretical approaches, as well as the application of USAID's Local Systems[13] and Capacity 2.0[14] Frameworks, CSA proposes a conceptual framework of four dimensions in which CSOs carry out their work. This framework offers a closer look at organizations from the individual (internal) to the systemic level as proposed by Sales and integrates a consideration of the collective and the sectoral dimensions as well.

CSA'S FRAMEWORK TO ANALYZE CSOS' CONNECTIONS AND ENGAGEMENT WITHIN LOCAL SYSTEMS

The first of the four dimensions is the internal, which Sales describes as the sphere in which organized civil society institutions operate as individual actors, guided by their internal identity, mission, and vision. The second is the collective dimension, which is an intermediate stage of interaction with other actors through networking and, in some cases, organized efforts by a group of organizations. This collective dimension involves a group of homogenous actors with network participation limited to organizations that share the same thematic areas of intervention, e.g., the crime prevention collectives that form based on the common issue they prioritize. The third dimension is sectoral in nature, where CSOs recognize each other as part of a larger collective of diverse actors with common priorities that are not necessarily related to the particular themes that guide their work, but that share a common understanding of their roles within society. In this case, all are not-for-profit organizations that recognize themselves as part of the group referred to in Mexico as the third sector.[15] The last of the four dimensions is the systemic, which represents the largest scale of impact in terms of increased connections and engagement across sectors and social agendas. This dimension refers to CSOs that connect with other actors, such as the government, private companies, media outlets, and any other group outside the third

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[11] Fioramonti Lorenzo, V. F. (2007). How Civil Society Influences Policy: A Comparative Analysis of the CIVICUS Civil Society Index in Post-Communist Europe. CIVICUS/ODI, Overseas Development Institute (ODI). Accessed at https://www.odi.org/sites/odi.org.uk/files/odi-assets/publications-opinion-files/224.pdf, on 06.20.20.

[12] Chávez, Becker, E. A. (2016). Retos, perspectivas y horizontes de las organizaciones de la sociedad civil en México. Los caminos hacia una reforma de la LFFAROSC. (P. 38, Trans.) Mexico. Accessed at http://ibd.senado.gob.mx/sites/default/files/Estudio_Final_Retos_y_Perspectivas_de_las_OSC.pdf, on 06.20.20.

[13] USAID. (2014). Local Systems: A Framework for Supporting Sustained Development, Accessed at https://www.usaid.gov/policy/local-systems-framework on 06.30.20.

[14] FHI 360, Social Impact and USAID. (2018). Capacity Development Interventions: A guide for program designers. Development practitioner series, Accessed at https://www.ngoconnect.net/sites/default/files/2018-12/SCS%20Global_Capacity%20Development%20Interventions%20Guide_FINAL.pdf , on 06.20.20.

[15] Chávez, Becker, E. A. (2016). Retos, perspectivas y horizontes de las organizaciones de la sociedad civil en México. Los caminos hacia una reforma de la LFFAROSC. (P. 38, Trans.) Mexico. Accessed at http://ibd.senado.gob.mx/sites/default/files/Estudio_Final_Retos_y_Perspectivas_de_las_OSC.pdf on 06.20.20

sector. This fourth dimension draws organizations' attention to what are otherwise frequently unnoticed common and connected priorities and actions among sectors.

Figure 2 provides more information on the four dimensions that characterize CSOs' interactions and collaboration within local systems:

Fig 2. CSA: Four Dimensions of Civil Society Connection and Engagement

Collective Dimension
Organizations connect with other organizations that share a similar mission and or complement theirs directly. They can begin to identify themselves as part of a bigger system based on their common social agenda.

Sectoral Dimension:
Organizations interact with like-minded organizations without limiting their interactions based on similarity of their missions but integrating in a heterogeneous system of CSOs.

Internal   Collective   Sectoral   Systemic

Internal Dimension
Organizations interact within a group of local stakeholders and like-minded organizations. In some cases, they don't interact with their peers and connect only with their target populations or constituents.

Systemic Dimension
Organizations connect with different stakeholders that don't necessarily share their mission or belong to the same category of organization. Within this dimension connection with private sector, public sector, media and individuals occurs with the intention to influence the system and particularly policy decisions.

The ways that civil society organizations navigate these four dimensions is in a state of constant change, depending on civil society dynamics in Mexico. Therefore, CSOs do not occupy a static position in one of the four dimensions, rather their position among the four dimensions changes over time. Thus, CSA suggests using this multi-dimensional framework as a flexible but holistic capacity development approach based on empirical observation of how and whether CSOs connect and engage with stakeholders to achieve a systemic impact.

CSOs' interactions across the four dimensions are not necessarily sequential in nature. Although it is common to progress step by step from the internal to the systemic dimension, some organizations begin by having interactions with governments and public actors as part of the internal processes of fundraising and project implementation that involve negotiations with authorities. However, the key distinction that this framework suggests is analyzing the dimensions of connections and engagement (sectoral/systemic) based on organizations' specific intention and performance. Intentionality of connection will determine the likelihood of CSOs achieving a systemic impact: Their ability to influence their system requires them to understand the value of connections and purposefully seek opportunities

to engage with other stakeholders. Furthermore, these interactions will differ depending on each organization and its individual circumstances, which can be determined as stages of organizational development.[16]

RELATIONSHIP BETWEEN THE FOUR DIMENSIONS AND THE DEGREE OF ORGANIZATIONAL MATURITY

The Capacity 2.0 approach and Human and Institutional Capacity Development (HICD)[17] model characterize CSOs by three stages of development: Nascent, Emergent and Mature. We suggest that these stages of organizational development are directly correlated to the dimension in which CSOs interact. Moreover, as organizations evolve towards maturity, they relate to others through dimensions that evolve incrementally into systemic interactions. In addition, the scope of CSO work broadens and becomes increasingly strategic, innovative, and transformational. Thus, by increasing the level of organizational maturity, organizations tend to establish a larger number of heterogeneous connections that evolve into the systemic dimension. Likewise, as organizations aim to engage beyond their local, thematic, and sector-specific needs, gravitating towards systemic interaction, they are also prompted to evolve at the organizational development level, requiring leaps in orientation and performance to reach a mature stage. However, organizations must meet their most basic needs before they can focus on more complex connections as they evolve through the four dimensions. As organizations develop their capacities, they become more mature and are able to transition to the other dimensions.

Table 1 depicts the relationship between the connection and engagement dimension, the level of organizational development, and the organizational orientation.

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[16] FHI 360, Social Impact and USAID. (2018). Capacity Development Interventions: A guide for program designers. Development practitioner series, Accessed at https://www.ngoconnect.net/resource/capacity-development-interventions-guide-program-designers on 06.20.20.

[17] USAID. (2011). Human and Institutional Capacity Development Handbook: A USAID model for sustainable performance improvement, Accessed from https://usaidlearninglab.org/sites/default/files/resource/files/HICD%20Handbook%202011%20-%2008.pdf on 05.29.20.

Table 1. CSA's CSO Orientation Analysis: Connection Dimensions and Level of Organizational Development Maturity

Dimension	Connection and Engagement Orientation	Level of Organizational Development Maturity	Organizational Orientation
1	Internal and Local	Nascent	• Outputs • Needs in local environment • Micro focus • Internal strengthening • Individual transactional excellence • Limited innovation/best practices benchmarking • Connections with local stakeholders
2	Collective	Nascent/Emergent	• Outputs and Outcomes • Thematic context needs • Macro focus on specific topics • Collective transactional excellence • Best practices benchmarking • Connections with homogeneous stakeholders based on social cause
3	Sectoral	Emergent	• Outcomes • Sectoral context needs • Macro focus on sector requirements • Mainstreaming transactional excellence • Innovation • Connections with homogeneous stakeholders based on organizational typology, opportunities and threats
4	Systemic	Mature	• Impact • Systemic exploration (outward driven) • Macro and meta focus on Local system • Transformational orientation • Innovation and Emerging practices • Connections with heterogeneous stakeholders based on systemic assessment and proactive interactions

CSA collaborated with CSOs across the board to advance their level of organizational maturity. The Activity established a baseline of organizational capacity with twenty eight

organizations per CSA's Midterm Assessment Report.[18] Among the organizational assessment tools CSA used for this group was the Organizational Performance Index (OPI),[19] which measures changes in organizational performance outcomes over time, i.e., beyond outputs. 57% (16 CSOs) scored between one and two out of a possible three on the organizational maturity spectrum and were categorized as Nascent; while 39% (11 CSOs) scored between two and three, categorized as Emergent. Finally, only 3% (1 CSO) scored above three, categorized as the only Mature organization during the baseline measurement.

Although CSOs are constantly in flux, they possess characteristics that place them on a spectrum of organizational development according to OPI. OPI focuses on performance or outcome-level results, centering on processes and the extent to which outputs of capacity development support positive changes in the way organizations "deliver services, relate to their stakeholders and react to changes in the external environment."[20] Since OPI outcomes are measured against prior performance, it is possible to determine the degree of organizational connectedness and engagement outcomes based on their progression across the dimensions outlined in this paper.

Upon implementing OPI, CSA measured performance in four domains: Effectiveness, Efficiency, Relevance and Sustainability. Of particular importance given USAID's focus on the Journey to Self-Reliance (J2SR), the Sustainability domain is linked to the dimensions of engagement and connection, which are suggested in this paper. Sustainability is the ability of an organization to ensure its services are supported by a diverse base of local and international resources that may include funding, people, trust, and other types of support.[21] Thus, social capital is a driving element of this domain, given that sustainable organizations understand and use the power of social capital, comprised of the relationships and connections in their communities that promote the successful implementation of their programs to achieve desired results.

Per their baseline assessment, CSA's grassroots CSO partners were categorized as Nascent. Conversely, ISOs were categorized as Mature organizations. Moreover, the performance of these diverse organizations in the sustainability domain varied significantly where ISOs have higher scores than local-grassroots driven CSOs. This domain indicates the levels of capacity

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[18] USAID Mexico Civil Society Activity. (2019). Midterm Assessment Report: Key Findings and Recommendations.
[19] FHI 360, Social Impact and USAID. (2018). Capacity Development Interventions: A guide for program designers. Development practitioner series. Accessed at https://www.ngoconnect.net/resource/capacity-development-interventions-guide-program-designers on 06.20.20.
[20] Pact. (2015). Organizational Performance Index (OPI) Handbook: A practical guide for the OPI tool for practitioners and development professionals. Accessed at https://hkdepo.am/up/docs/OPIhandbook_pact.pdf on 07.13.20.
[21] CSA has developed a model that characterizes the dimensions of sustainability, which considers factors related to funding, management structure, culture and processes, drawing upon elements of the Non-US Pre-Award Survey and OPI. For more information, please consult the document *Building Sustainable Learning Communities to Strengthen the Local System (2020)*, which is also included in CSA's Legacy Compendium.

for social capital (connections and collaboration).[22] Furthermore, sustainability was an important element in the hierarchy of mature organizations' objectives and their efforts were in line with this expressed interest. This validates the intrinsic relationship between organizations' advance through dimensions and organizational development maturity.

CSA designed a capacity development approach that considered the diverse organizational maturity profiles of CSOs within its group of partner organizations. Thus, the Activity customized its technical assistance offerings to ensure that organizations could progress through the maturity spectrum. The Activity focused on assessing the degree of organizational development at baseline, followed by a series of tailored solutions to close identified performance gaps according to organizational needs and priorities. CSA also provided a space for collaboration in the form of a Learning Community,[23] which facilitated engagement and connection among the participating organizations.

CSA's efforts strengthened connections at the collective, sectoral, and systemic dimensions. Within the collective dimension, CSA supported organizations in interacting to advance their common themes and types of work and in identifying common and complementary methodologies, target populations, approaches, and practices. In addition, CSA provided opportunities for CSOs to envision the role of civil society in their local context and to articulate challenges, constraints, and opportunities for the civil society sector to flourish. Finally, at the systemic level, CSOs were provided opportunities to visualize the systemic networks[24] in which they interact and connect with the intent of undertaking more effective advocacy at the systemic level. Among the mechanisms used to establish connections and engagement within these dimensions were the Learning Community, Study Tour[25], capacity

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[22] USAID Mexico Civil Society Activity. (2019). Midterm Assessment Report: Key Findings and Recommendations.

[23] Please consult the document Building Sustainable Learning Communities to Strengthen the Local System, which is also included in CSA's Legacy Compendium.
USAID Mexico Civil Society Activity. Huerta, Maria and Elise Storck. (2020). Building Sustainable Learning Communities to Strengthen the Local System.

[24] FHI 360, Social Impact and USAID. (2018). Capacity Development Interventions: A guide for program designers. Development practitioner series, Accessed at https://www.ngoconnect.net/sites/default/files/2018-12/SCS%20Global_Capacity%20Development%20Interventions%20Guide_FINAL.pdf , on 06.20.20.

[25] Please consult the document Exchanging Best Practices in the Civil Society Sector: A Replicable Study Tour Model, which is also included in CSA's Legacy Compendium.
USAID Mexico Civil Society Activity. Huerta, Maria and Elise Storck (2020). Best Practices in the Civil Society Sector: A Replicable Study Tour Model.

development in strategic alliances, Legal Advisory services through a pro-bono network, and other customized capacity development.

As organizations progress through the stages of organizational development they also transit through the dimensions of engagement and connection
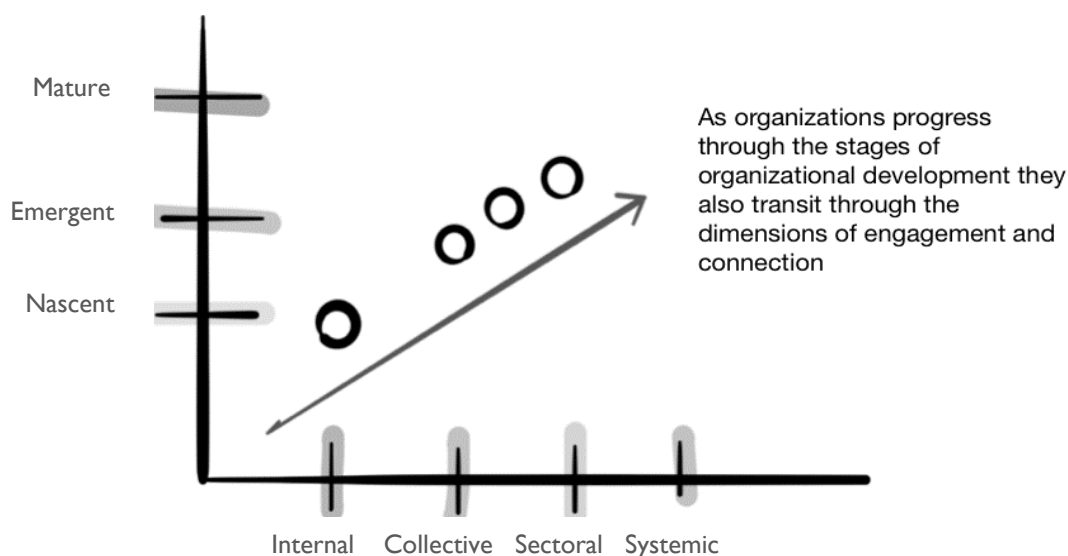
Fig 3. CSA: Connection between Four Dimensions of Interaction and Levels of Organizational Maturity

As a result of CSA's prompting CSOs to refine their own organizational performance priorities, organizations placed more emphasis on strengthening their social capital during their organizational development. Ideally, this will lead them to engage and connect across dimensions with the goal of reaching the systemic level, thereby sustainably improving their OPI.

Through their participation in CSA´s capacity development model, the partner CSOs progressed through the levels of organizational development. As described in the Final Report, 66 percent of these organizations progressed from the Nascent baseline to the Emergent Level and 1 percent progressing from the same baseline to the Mature level. Additionally, and 55 percent of these organizations progressed from the baseline of Emergent to the Mature level. The Activity also monitored progress in their levels of interaction and connection through systems-based mechanisms and strategies. Figure 3 demonstrates the correlation between the dimensions of interaction and connection, and the levels of organizational maturity.

IMPLICATIONS OF THE 5R'S FRAMEWORK

Upon identifying the importance of capacity development in CSOs' progress across the dimensions and after promoting their connections and engagement to advance organizational maturity, CSA also noted the significance of prioritizing CSOs' understanding of the local system to catalyze and sustain systemic change. CSA utilized USAID's 5Rs Framework when inculcating a greater level of attention in CSOs in their systemic impact.

The 5Rs Framework provides a structured process for interpreting and analyzing local systems practice by considering five key elements: Results, Roles, Relationships, Rules and Resources.[26] Practitioners use the five elements and a series of associated questions to inform capacity development interventions and programing. CSA recommends analyzing the 5Rs to define the extent to which each CSO carries out the four dimensions of engagement and connection and to understand the characteristics and motivations of organizations based on their organizational maturity (Capacity 2.0).

In general terms, the 5Rs can be mapped to the four dimensions of connection and engagement as illustrated in Table 2.

Table 2. CSA: 5Rs-Oriented Organizational Profile per Dimension

Dimension	Results	Roles	Relationships	Rules	Resources
Internal	Program and organizational output-level, bottom-up, driven by target communities, donor responsive, limited to local stakeholders	Inconspicuous, passive, narrow and limited	Contractual as well as informal, focused on project or program performance	Top-down, difficult to modify rules	Limited and conditional

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[26] USAID (2016). The 5Rs Framework in the Program Cycle. Technical Note. Accessed at https://usaidlearninglab.org/sites/default/files/resource/files/5rs_techncial_note_ver_2_1_final.pdf on 06.27.20.

Collective	Output-level: Strategic Alliances Outcome level: partnership-oriented, limited to specific social causes	Multiple (organizational and strategic alliance driven)	Formal, focused on strategic alliance outcomes, collaborative and mutually beneficial	Formal / informal and modifiable	Expandable, strategic and outcome-oriented
Sectoral	CSO sector: outcome-oriented, change driven by sectoral needs, increasing number of like-minded stakeholders, streamlining	Strategic, multiple, formal and focused on shared perspectives of sector's performance and sustainability	Formal, collaborative and focused on sector's outcomes	Formal, modifiable but difficult	Limited and outcome-oriented
Systemic	Transformational and impact-driven, trend and external environment conscious, Ecosystem level change	Proactive, influencing, prominent, strategic, multiple	Reciprocal, collaborative, horizontal and diverse	Formal and informal, modifiable but complex due to interdependency.	System-oriented, vast and diverse, linked, increased connections and systemic change.

Table 2 portrays how CSOs interact at different levels in terms of their relationships and roles, which are shaped by the resources and rules that effect their ability to achieve specific results. Moreover, as CSA determined individual organizations' stages of development and dimensions of engagement, the Activity noticed certain distinctions regarding their particular roles and relationships. For example, a Nascent organization has interactions that are limited to satisfying its own goals and mission, implying that its relationships focus on the organization's stakeholders and its role as a service provider to a specific target population, based on local needs.

The 5Rs and Capacity 2.0 frameworks help understand the complex dynamics of CSOs. However, it is not the objective of this paper to map all those dynamics. Instead, CSA explored the following questions: How can practitioners help CSOs better understand their organizational development in terms of their capacity to improve their strategic

interactions? How do CSOs interact with each other? Why do they invest resources in those interactions? How can these interactions contribute to the achievement of their objectives? What factors enhance or inhibit connections?

DIMENSION 1: INTERNAL CONTRIBUTIONS

As noted, organizations in the dimension of internal contributions focus their actions towards meeting their constituents' needs at a local level. Regardless of their stage of organizational development or dimension of their connections and engagement, however, all CSOs provide contributions to the broader system. What varies is their capacity to influence intended changes at a greater scale.
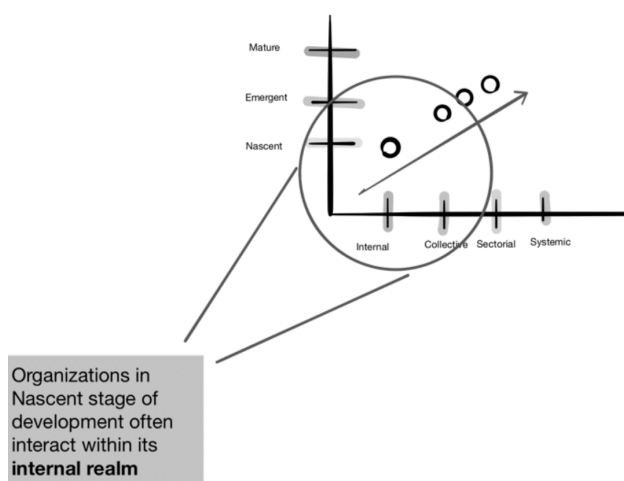
Due to their limited resources, nascent organizations' roles are primarily oriented towards executing their mission and achieving results that benefit their target populations. Their relationships deepen with their target population; this, in turn, supports their grassroots presence, enhances their ability to understand their constituents' needs, and consequently advance their mission. In some cases, they reach out to relevant actors within the system such as donors or governments for direct support without the intention of directly influencing their policy decisions and therefore, affect the system in a more robust fashion.

Throughout CSA's implementation, partner organizations shared their interests and perceived constraints regarding collective and systemic work. Mexican organizations working in areas of human rights, crime prevention, and rule of law demonstrated how they prioritize their resource use to take specific actions to support their constituents. In the process, even if these CSOs remain focused on the internal dimension of activities, they contribute to improving social conditions in the technical areas they address.

Fig 4. CSA: Relationship between Nascent Stage Organizational Maturity and the Internal Dimension

Organizations in Nascent stage of development often interact within its **internal realm**

As illustrated in Figure 4, CSA observed that organizations tend to focus internally when they are nascent, due to constrains such as lack of resources or limited public attention. This is not unique to Mexican CSOs, as Downs observes in organized efforts to advance ecological agendas around the world. Thus, the possibility of working collectively depends on

factors such as the relevance of the problem that organizations tackle and the extent to which this problem attracts public attention, social pressure, and financial resources.[27] Moreover, a set of political and societal factors outside of CSOs' control can also define the public agenda,[28] restricting the space in which CSOs can exert influence.

DIMENSION 2: COLLECTIVE CONTRIBUTION

In the second dimension of connections and engagement, CSA observed that organizations are likely in the process of becoming emergent, which means they are balancing internal and external priorities against the environment (Capacity 2.0). In this sense, the roles of the organizations in relation to other actors are still transactional, but mostly contemplate an outcome-level change and start seeking potential synergies to achieve it.

As organizations enter the emergent phase, their interactions reflect a growing collective ethos, but still face constraints similar to those faced by organizations in the internal dimension. As systematized by Alternativas y Capacidades in their Advocacy Manual,[29] some organizations tackling a variety of social issues, such as human rights, crime prevention, gender inclusion, and justice reform, work collectively to achieve common goals. Alternativas y Capacidades agrees that some of these organizations engage in collaborative interactions without allocating resources specifically to deepen their connections. Rather, connections and interactions at this level are enhanced primarily by the tacit values that organizations with similar agendas share. Thus, it is easier for CSOs to collaborate in this dimension due to their common understanding of challenges and priorities and the greater likelihood of reaching agreement.

An important capacity development consideration for supporting CSOs in this dimension is that the organizations have reached a level of maturity that gives them more clarity about their individual organizational identity. This enables more mature, emergent organizations to begin to understand the pathways through which they can create synergies with like-minded actors, look beyond specific and limited gains for their own organization and place increasing value on the outcomes of collectivism and cooperation.

DIMENSION 3: SECTORAL CONTRIBUTION

In the third dimension, organizations interact with their peers regardless of the heterogeneity of their causes. These organizations are more consolidated and have

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[27] John Kingdon, Agendas, Alternatives, and Public Policies, 2nd ed., Reading, Mass.: Addison-Wesley, 1995, chapter 9.

[28] Anthony Downs, "Up and Down with Ecology—The Issue Attention Cycle," The Public Interest. Vol. 32 (Summer 1972) 38-50.

[29] García y Osorio, Estrategias y Herramientas para la Incidencia en Políticas Públicas, Alternativas y Capacidades, ISBN: 978-607-98481-5-6. Accessed at https://alternativasycapacidades.org/wp-content/uploads/2019/10/Estrategias-ISBN-DIGITAL.pdf, on 06.20.20.

transitioned fully to the emergent stage. In this dimension, organizations interact through a more varied set of roles and relationships, often participating in different networks based on shared organizational characteristics as a not-for-profit, notwithstanding their distinct technical agendas. The complexity of these relationships is determined by a broader set of rules, in many cases involving the legal framework, that inform and potentially inhibit the priorities of these organizations as a sector.

These organizations continue to focus on achieving their goals. However, they also work collectively within their sector up to a certain point when constraints begin to affect CSO capacities to develop and maintain relations with external peers. Often due to resource constraints, leaders and staff are unable to participate more actively in the creation of common agendas beyond the specific technical mandates of their organizations. As in the other cases, resources constitute an important constraint in this dimension, since most of the interactions as a sector involve the investment of time, staff, and funds in activities that are not related to specific projects. In general, CSOs must use the bulk of their funds for specific project activities and target populations; this is driven by the limited availability of core funding to CSOs beyond direct program support, which in turn, tends to override a strategic emphasis on sustainability and collaboration. These constraints within the system reduce the number of organizations that are able to connect with other sectors and with wider systemic actors such as public, private, or media stakeholders.

Despite these constraints, Mexican CSOs manage to contribute within the sectoral dimension through cooperation. For example, the "Red de Actores Estratégicos" (Strategic Actors Network) promoted by Alternativas y Capacidades highlights the experience and leadership of funding organizations and "*fortalecedoras,*" or ISOs in promoting a common agenda for strengthening organized civil society in Mexico. This agenda has established 25 key actions in four thematic areas: trust towards civil society organizations; the regulatory framework; strategic social investment; and institutional strengthening – all with the objective of generating greater civil society impact on Mexico's social development. This initiative represents the sum of efforts among different strategic actors that generate an environment conducive to the expansion, development, and consolidation of the organized civil society sector.[30]

An additional note on this dimension is that its sectoral name is not accidental; the term refers to a shared identity that began to form in the second, collective stage. Many actors from distinct collective dimensions may converge as a sectoral body, which helps explain why in some cases, an organized movement from the third sector may seem fragmented. Therefore, capacity development efforts should target these growing connections so that increased sectoral identity can be promoted and developed.

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[30] Alternativas y Capacidades, A.C, 2020. Agenda de fortalecimiento de la sociedad civil organizada. Acciones para contribuir a elevar su impacto en el desarrollo social de México a 2030. Accessed at https://alternativasycapacidades.org/wp-content/uploads/2019/04/Agenda-2030-vf-WEB-1.pdf on 07.13.20.

DIMENSION 4: SYSTEMIC CONTRIBUTION

A key characteristic of organizations in the last dimension is their intentional approach to achieving transformational, systemic change. CSOs in this dimension have attained a level of maturity that enables them to clearly define their role vis-à-vis other actors in achieving outcome-level objectives and impact. They see themselves as part of a bigger system in which all their resources, relations, roles, rules, and results are perceived as interconnected with others.
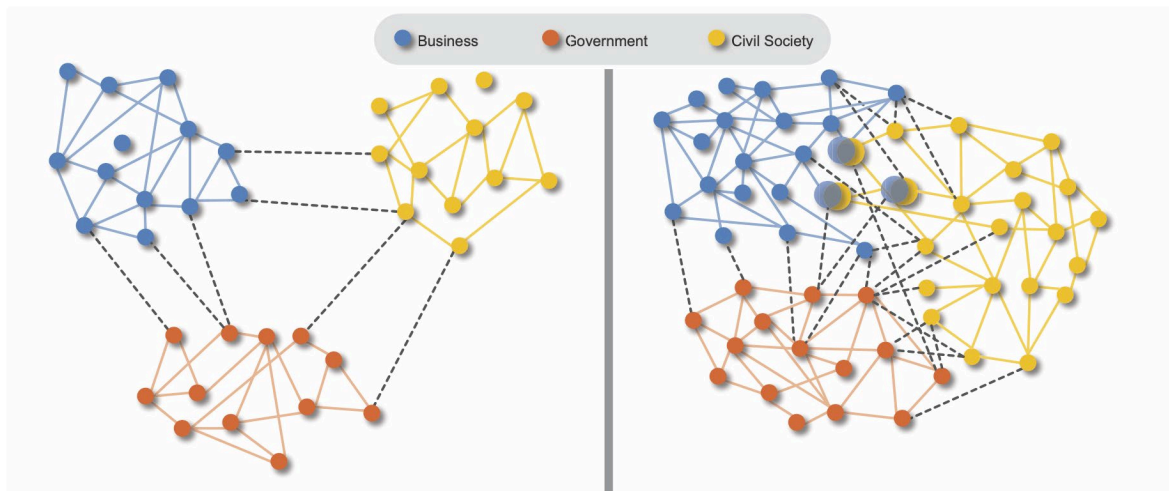
Source: World Economic Forum/ KPMG

Figure 5. World Economic Forum and KPMG -
Changing Paradigm of Connection and Engagement Among Sectors

Figure 5 depicts the change in paradigm that occurs from the sectoral dimension towards the systemic dimension. In the latter, organizations recognize the need to engage collectively beyond sectoral and disjointed work to tackle multidimensional issues jointly through connection and engagement that drives significant change. CSOs' progress – and their capacity – increases from working between sectors to understanding the intricate network of connections across several levels, whether at the organizational, sectoral, thematic or other levels within a diverse group of stakeholders.

According to the systems thinking approach, organizations in this dimension see themselves as a part of larger group with which they interact both directly and indirectly.[31] These organizations actively map their relations with other actors in the system to identify paths of transformational change. This involves the capacity of zooming out and understanding the

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[31] Morgan, P. (2005). European Centre for Development Policy Management. Accessed at https://ecdpm.org/wp-content/uploads/2005-Idea-Practice-Systems-Thinking-Relevance-Capacity-Development.pdf, on 06.20.20.

dynamics that influence their daily and strategic activities alike. They understand that by only zooming in on their internal capacities, they might focus too much on operational specifics that undermine their interconnectedness with other actors. In this dimension, organizations establish institutional behaviors to coordinate their efforts with other actors in the social development system, justice strengthening system, or the violence prevention system, etc. with the intention of contributing to the achievement of specific and clearly identified outcomes.

Inculcating and supporting systems-focused behavior is easier said than done since organizations in this dimension face challenges, such as the difficulty of accurately determining the sub-system they can influence, the presence of dominant actors with whom it may be difficult to establish and maintain balanced partnerships,[32] and a history of dependency that can undermine their efforts to connect.[33] The objective of this paper is not to examine the challenges that inhibit systems thinking, but instead to describe: a) CSA's direct experience that, when organizations are explicit in their intention to interact strategically with other stakeholders in the system, they tend to derive benefits from working in the system that they can apply to achieving their mission; and b) why CSA favors the systems thinking approach based on the observation that, once CSOs interact within the system, they form constellations of organizations connected with other types of actors that help make the system more hospitable to their work and thereby increase the sustainability of their results.

CSA's Study Tour initiative provided an expansive opportunity to understand and promote systemic interactions and observe their impact across diverse types of actors. The Activity carried out the Study Tour in October 2019 with eight Mexican influencers that participate within a local system (public, private and civil society sectors) who exchanged in dialogue with their Colombian counterparts. CSA selected the Mexican cohort based on a set of criteria that included such considerations as leadership, inclusion, equality and systemic impact. The group traveled to Colombia to understand systemic efforts there to promote a culture of peace by increasing the level of collaboration among multiple stakeholders. An important result of Mexican local leaders' participation in the Study Tour was their decision to develop a collaborative strategy upon their return to Mexico, with specific undertakings and results achieved within months of this Study Tour. The participants formed a learning community to put into practice all that they learned. As a result of their organizing and strategizing collectively, these participants successfully promoted the institutionalization of a more comprehensive and responsive judicial system in the State of Sonora to attend to victims of violence, which was possible through the collaboration of strategic actors

[32] Morgan, P. (2005). European Centre for Development Policy Management. Accessed at https://ecdpm.org/wp-content/uploads/2005-Idea-Practice-Systems-Thinking-Relevance-Capacity-Development.pdf on 06.20.20.
[33] Weaver, A. M. (2001). When policies Undo Themselves: Self Undermining Feedback as a Source a Policy Change. Governance: An international Journal of Policy, Administration and Institutions. pp 2.

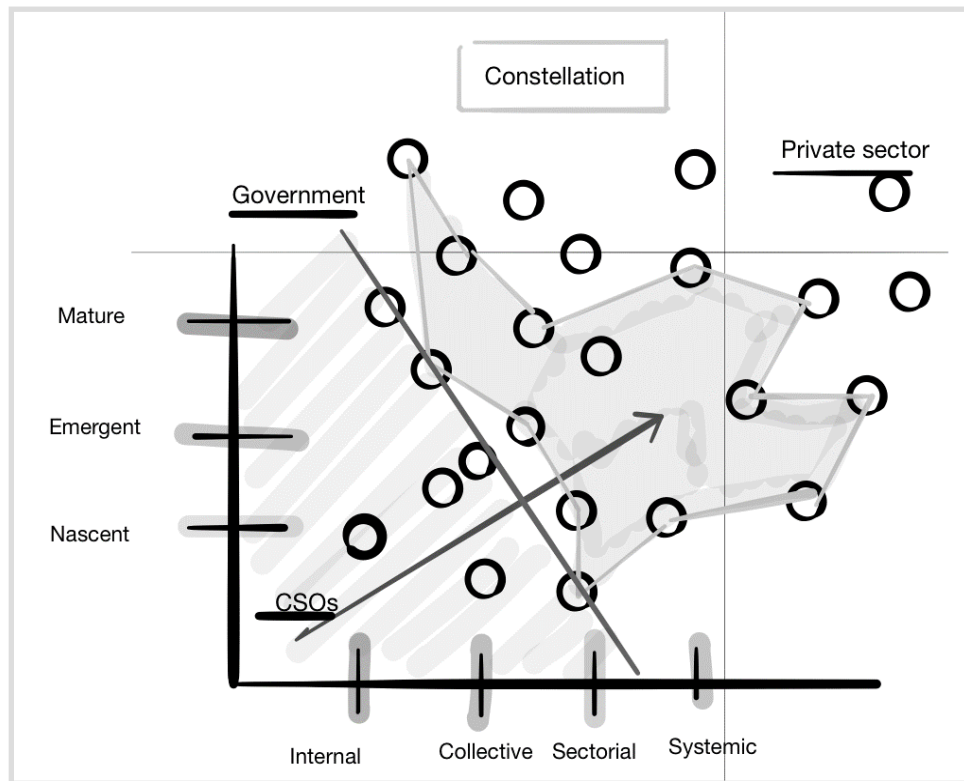representing the government, civil society, and the academy.

THE ADDED VALUE OF SYSTEMIC CONSTELLATIONS

The constellations model proposed by Tonya and Mark Surman provides an advanced approach of partnering that brings together groups from multiple sectors with the explicit intention of taking joint action to work toward a joint outcome.[34] Their emphasis lies in the interactions and relationships among the actors and their increased attention to, and understanding of, these collaborative dynamics. As noted, going from the internal dimension to the systemic is an organic evolution that further develops networks of connections. These may be referred to as constellations in which organizations connect with each other and other actors within the system. Each constellation can form connections with other organizations, generating a vast set of interactions.

Figure 5 depicts how organizations in the four dimensions connect with each other differently depending on their development stages and their results, resources, roles, relations, and rules. The result of this interaction – a constellation – is a wider connection that is not accidental, but incidental to the dimension in which the organizations interact.

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[34] Surman, Sonya and Mark Surman. (2008), The constellation model of collaborative change, Social Models. Accessed at: https://socialinnovation.org/wp-content/uploads/2016/10/Constellation-Paper-Surman-Jun-2008-SI-Journal.pdf on 06.20.20.

Figure 5. CSA Constellation representation, Organizational Development and Dimension Progression

The image portrays how organizations from the sectoral and systemic dimensions, which are in the emergent or mature stages, are likely to form constellations (depicted in the pink area). The gray area depicts how organizations in the first two dimensions and development stages will reach the constellations as they progress from one stage to the next. It may be argued that this is not a linear process and that whenever organizations participate in networks, they engage in constellations, which is a valid point. However, CSA's approach (based on the Surman's theory) targets organizations' *intention to interact within the system to influence it* in a way that the system can better support the achievement of their missions.

Further analysis will help understand the dynamics of organizations that form constellations. Over the course of CSA, the approach was to implement a capacity development strategy to strengthen CSO capacities towards reaching the level of connection highlighted in Figure 5 so that within those connections, CSOs can increase their ability to achieve their mission, develop as organizations, and contribute to their local system.

THE CIVIL SOCIETY ACTIVITY'S TAKEAWAY:
ORGANIZATIONAL DEVELOPMENT AND EVOLUTION THROUGH DIMENSIONS OF ENGAGEMENT AND CONNECTIONS

CSA utilized a capacity development framework designed to strengthen CSO capacities to connect, engage and influence, while considering partner organizations' transition through the four dimensions described above. During implementation, CSA identified several endogenous factors that influenced the strengthening process. The COVID-19 pandemic, for instance, is one endogenous factor that shook the sector to its core. However, even before the crisis occurred, issues such as elections, legislative reforms, and the tragic loss of partner organizations' members due to femicide, also had a profound impact on the CSOs. These experiences enhanced the organizations' sense of commitment while revealing the complexities of being "resilient" in such an environment.

CSA's focus evolved as the Activity's staff and consultants learned how to adapt to the changing environment. The team observed that, in some cases, organizations did not prioritize connections with other organizations that were different from them. This lack of connection contributes to certain fragmentation of the sector. Further the lack of openness among CSOs and their mistrust of other actors in the public or private sector, which CSOs may ostracize, limits their capacity to react to exogenous pressures effectively.

To overcome this fragmentation and enable greater connections among actors within the system, CSA's approach provides a starting point for achieving greater sectoral cohesion.[35] If, while developing capacities in CSOs and ISOs, practitioners can identify the dimensions and stages of development in which CSOs connect from less complex relations to more complex systemic connections across several levels, the strengthening efforts can focus on gradually increasing cohesion in the system, rather than expecting organizations to immediately interact in the systemic dimension when they are ill prepared. Though, the question remains, how do we get there?

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[35] In social network analysis, the term network cohesion refers to a measure of the connectedness and togetherness among actors within a network.
Frey, Bruce B. The SAGE Encyclopedia of Educational Research, Measurement, and Evaluation. Accessed at: https://dx.doi.org/10.4135/9781506326139.n469. Print ISBN: 9781506326153 | Online ISBN: 9781506326139, on 06.20.20.

RELEVANCE OF THE FRAMEWORK

CSA's framework based on four dimensions of engagement and connection in the local system is intended to demonstrate the value of various types of interaction to improving organizational performance. Evidence to support this framework has been observed in Brazil through initiatives targeting climate change[36] and in Colombia through efforts to drive systemic change in the areas of peace and security.[37] In order to monitor the results of its strengthening work, CSA first needed to identify the dimension in which an organization operated at baseline and then track its progress across the four dimensions based on CSA support. This included a full suite of strengthening efforts and solution packages in coordination with other efforts, such as grant-making focused on collaboration, systematizing best practices, convening Learning Communities for knowledge sharing and increased collaboration, etc.

One of CSA's most **valuable lessons learned is that by supporting CSO capacity to intentionally progress along the four dimensions of engagement and connection, they will more effectively identify opportunities to achieve the results they pursue.** This is mainly because the organizations have come to understand their role in the wider system, have identified the roles of other actors in the system and how these roles affect their own outcomes, and are thus better able to operate in this environment and achieve their desired results.

From a systems-based perspective, part of CSA's learning process entailed understanding that there is no single causal factor to achieve expected outcomes, because civil society is subject to multiple, uncertain external factors. **However, capacity development that is explicitly focused on increasing organizational connections and creating allies in addition to other strengthening activities can contribute to systemic change.**

RECOMMENDATIONS FOR FURTHER CSO ENGAGEMENT

Based on lessons learned and to support implementation of the suggested framework, CSA provides the following recommendations:

- CSO Selection and Profiling: When selecting partner organizations for capacity development processes, do so without regard to their level of organizational development or dimension of connection and engagement. Once the organization is

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[36] Aamodt, S. (2017). Seizing policy windows, policy influence if climate advocacy coalitions in Brazil, China and India 2000-2015. Science Direct, Elsevier Ltd, 118-123.
[37] Please consult the document *Exchanging Best Practices in the Civil Society Sector: A Replicable Study Tour Model*, which is included in CSA's Legacy Compendium.

selected and it has expressed its commitment to the strengthening partnership, however, begin the capacity building work by defining the organization's current dimension, validating their intentions to connect with other organizations and actors across sectors, and developing the participatory capacity development plan from there.

- Dimensions and CSO Contribution to the Local System: Value the contributions of all civil society organizations to social change even if they are in the nascent stage and internal dimension. CSOs that operate at the nascent stage and the internal dimension are already contributing to the system by virtue of their development-focused work, even if this is not completely evident. Ensuring organizations understand their role as contributors to the local system is key to their future progression and performance across dimensions.

- Understanding and Perceived Value of Connection and Engagement: When developing tailored capacity development plans for CSOs, work jointly with their leadership and staff to build a shared understanding of their intentions to connect, which will help drive the 5Rs, such as the resource allocation and the rules of engagement. Increased understanding of the importance of intentional, and ideally, strategic connection and engagement will better equip organizations to identify benefits and risks. Furthermore, invite the CSOs to continually assess their role, relationships, and the results of connecting over the course of the capacity building partnership.

- Collaborative Platforms: Aim to provide platforms and activities, such as Learning Communities and Study Tours, that may develop constellations of actors that can have shared agendas across different themes and sectors in order to achieve sustainable change.

- Learning and Adaptation: Continue learning[38] and adapting throughout the capacity development process and make organizational learning and adaptive management explicit in each organization's strategic and operational plans.

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[38] USAID, Learning Lab, Collaboration Learning and Adaptation CLA Framework and Key Concepts. Accessed from https://usaidlearninglab.org/sites/default/files/resource/files/keyconcepts_twopager_8.5x11_v7_20160907.pdf on 06.11.2020.

CONCLUSION

This paper is based on the premise that when CSOs collaborate among themselves and intentionally connect and work with other stakeholders, they expand their reach and have a greater likelihood of achieving the outcomes their missions dictate. More effective ways of tackling societal challenges are required; to be successful, these efforts will need to transcend sectoral barriers. This includes combining the resources and expertise of multiple sectors to address common challenges, as well as creating platforms that enable leaders across sectors to participate effectively in learning and decision-making.[39]

Based on this premise, CSA considered the following questions: If we are investing in capacity development, how can we better enhance CSOs' collective work? Where do we begin? The first step was to identify partner CSOs' current status through organizational assessments. Based upon these assessments, the Activity implemented tailored solution packages to assist in organizational development and the implementation of strategic USAID grants. CSA also identified the need to accompany the partners in becoming more mature organizations through strengthening work aligned with four dimensions of connection and collaboration, while highlighting the systemic gains from this process.

In this paper, CSA proposes that by identifying the stage of organizational development maturity as well as the dimension in which an organization connects and engages and the results, roles, relationships, rules, and resources that influence CSO orientation (USAID's 5 R's framework), practitioners can better target capacity development efforts. Rooted in the Capacity 2.0 approach, the Activity focused on improving and expanding each of these elements. CSA also suggests that portraying the constellations of engagement across different types of organizations and sectors helps depict the complexity of CSO interaction and supports systems thinking among the diverse actors.

The first dimension is internal, in which the organizations' intentions to connect correspond to objectives of their internal development. The second is the collective dimension, an intermediate stage of interaction with other actors that considers networking and, in some cases, organized actions of a group of organizations to promote a specific social cause and explore the system. The third dimension is the sectoral, where CSOs recognize each other as part of a larger collective that includes different organizations with certain common elements not related to their individual line of work, but that acknowledge the shared role their social causes play within the third sector. Their intention is to support each other as a sector with a common identity. The fourth dimension is the systemic sphere in which CSOs interact with the system, seeking to impact it by leveraging their connections and

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[39] World Economic Forum (2013). The Future Role of Civil Society. World Scenario Series p 33.
Accessed at http://www3.weforum.org/docs/WEF_FutureRoleCivilSociety_Report_2013.pdf on 07.13.20.

collaboration with a diverse range of actors across sectors that may or may not be directly aligned with their individual social agenda. CSA proposes that organizations in the fourth dimension develop constellations to better navigate the system in collaboration with other sectors and further promote their agendas. CSA's experience suggests the importance of understanding **the intentions and orientation of the CSOs to connect or not**, according to their dimension, to help identify further opportunities for USAID engagement and support.

In conclusion, CSA recommends that capacity development practitioners and initiatives supporting CSOs do so in a way that appreciates the heterogenous characteristics of these organizations. Given this heterogeneity, CSA recommends that practitioners identify the dimension and the stage of development of their partner organizations in order to fully understand how they interact with other actors. This involves an investment of time and effort to understand organizational priorities and design capacity development interventions focused on strengthening CSOs' connections. Based on these connections, capacity development can lead to the creation of constellations and organic collaboration between actors and sectors that can further contribute to systemic outcomes.

CSA acknowledges that there is no single way to analyze connections in the CSO sector, nor to generalize about the many local systems in which CSOs operate. Additional efforts are encouraged to continue understanding the diverse contexts and perspectives that affect organizational connections and engagement within the system. This paper provides a starting point to focus capacity development work based on the CSA experience in the hope that it will be useful for future programs and initiatives.

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