

Collaborative Stewardship Starter & Builder Kit

Worksheet: Collaborative Life Cycle and Capacity Assessment

Purpose

This assessment is designed to help collaboratives:

- Identify their current life cycle stage
- Build shared understanding among partners
- Assess stage-appropriate capacity strengths and gaps
- Prioritize investments, supports, and next steps

The assessment is intended for **reflection**, **learning**, and **alignment**, not compliance. It works best when used collaboratively by partners, backbone staff, or facilitators.

How to Use the Assessment

- Start with the Life Cycle Stage Rubric to identify your primary stage.
- Use the Life Cycle Worksheet to reflect and build alignment.
- Complete the Stage-Specific Capacity Assessment for your current (or emerging) stage.
- Use results to guide planning, funding, and capacity-building decisions.

Note: Collaboratives may show characteristics of more than one stage, especially during transitions.

From a forthcoming paper, *The collaborative life cycle: A journey from start-up to renewal (or decline)* (Mickel & Farrell, 2026).

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PART 1: Collaborative Life Cycle Stage Rubric

Use the rubric below to determine which life cycle stage best describes your collaborative *at this time*. Read across each row and select the column that most closely reflects your current reality.

Dimension	Start-Up	Building	Sustaining	Renewal	Decline
Collective Purpose & Goals	Purpose and goals are emerging and still being clarified	Purpose and goals are clearly defined and guide joint work	Purpose and goals are stable, shared, and embedded	Purpose and goals are being reassessed or refreshed	Purpose and goals are unclear, contested, or no longer motivating
Coordination Capacity (note: each stage includes ongoing coordination, convening & facilitation)	Coordination focuses on convening and facilitation	Coordination supports project management; systems and processes development, and accountability	Coordination supports operationalizing functions; systems and processes, and long-term strategy and learning	Coordination supports reflection and change	Coordination capacity is strained or unstable
Governance & Decision-Making	Governance is informal or emerging	Governance structures and agreements are formalized and used	Governance supports shared leadership; agreements and authorities are operationalized	Governance and structures are re-assessed and redesigned	Governance is unclear or inactive
Shared Strategy & Priorities	Strategy is exploratory	Strategy is translated into priorities and work plans	Strategy supports sustained impact and is integrated into partner's plans	Strategy is being reimagined	Strategy is outdated or absent

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Systems & Infrastructure	Systems are minimal or ad hoc	Systems support coordination, priority-setting, and reporting	Systems are durable, integrated, and scalable	Systems adapt to support learning and transition	Systems are weak or underused
Collaborative Practices, Skills, and Tools	Foundational collaborative skills are emerging; norms and culture are still forming	Collaborative skills and inclusive culture guides shared ways of working; collaborative competencies are enhanced and adopted among partners	Collaborative leadership skills and culture are embedded and reinforced over time	Adaptive leadership, learning, and change-management skills are being strengthened	Collaborative skills and culture have eroded or are inconsistently practiced
Inclusive Culture (Including Belongingness)	Inclusion and belonging are emerging priorities; participation is broadening and inclusive norms are forming	Inclusion and belonging are intentionally embedded in decision-making; diverse partners have meaningful voice	Inclusion and belonging are foundational to culture and leadership; partners feel valued and influential	Inclusion and belonging practices are being reassessed and strengthened to ensure shared influence	Inclusion and belonging are inconsistent; participation may be tokenized and voice concentrated among a few

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Meaningful Relationships	Relationships are forming and norms of mutual respect & reciprocity are being established	Relationships are grounded in respect & reciprocity and support coordinated action across partners	Deeply respectful relationships, reciprocity, and mutual accountability sustain long-term collaboration	Relationships are being rebuilt with attention to restoring respect and shared commitment	Relationships lack mutual respect; dynamics may feel transactional, strained, or fragmented
Collaborative Mindset	Partners are seeing the value of collaboration and shifting toward shared ownership and joint action	Partners demonstrate shared ownership and prioritize collective goals over organizational self-interest	Partners share a strong collective identity and sense of ownership in the collaborative; and decision-making reflects a strong collaborative mindset	Adaptive and collaborative leadership are emphasized to navigate change and reinvention	Individual organizational interests are prioritized over collective purpose and goals
Partner Engagement & Trust	Trust-building is a primary focus; engagement is centered on a core group	Trust is established; engagement is active and expanding	High levels of trust and sustained commitment among partners	Engagement fluctuates as partners reconsider alignment	Engagement is declining; participation is inconsistent
Operational Functioning of the Collaborative	Operations are informal and largely relationship-driven; processes are still forming	Core operational processes (planning, coordination, reporting) function reliably	Operations are efficient, well-integrated, and support sustained work	Operations are being adapted or redesigned to support new directions	Operations are inconsistent, strained, or no longer support the work

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Projects and Programs	Early signs of progress such as improved coordination or pilot activity	Tangible early outcomes or improvements are visible in practice	Consistent, measurable improvements are evident at the community or system level	New or redefined impacts are emerging as strategies shift	Impact is limited, stalled, or no longer visible on the ground
Evidence of Impact	Early alignment and readiness	Initial results are visible	Sustained outcomes are demonstrated	New outcomes are being explored	Impact is unclear or declining

Rubric Interpretation - The column with the strongest overall alignment indicates your primary life cycle stage. Alignment across two adjacent stages suggests a transition. Alignment with renewal and decline often signals an inflection point

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PART 2: Life Cycle Reflection Worksheet

Use this worksheet individually or as a group. Differences in responses are valuable and should prompt dialogue.

Section A: Identifying Our Stage

Primary life cycle stage today:

- Start-Up
 Building
 Sustaining
 Renewal
 Decline

Evidence or examples supporting this assessment:

Are we experiencing elements of another stage?

Section B: Capacity Snapshot

Which capacities feel strongest right now?

Structural Elements	Binding Elements & Others
<input type="checkbox"/> Coordination capacity <input type="checkbox"/> Collective purpose and goals <input type="checkbox"/> Shared strategy and priorities <input type="checkbox"/> Governance and decision-making structures <input type="checkbox"/> Collaborative practices, skills, and tools	<input type="checkbox"/> Inclusive culture <input type="checkbox"/> Meaningful relationships <input type="checkbox"/> Collaborative mindset <input type="checkbox"/> Others _____

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Which capacities are limiting our progress and why?

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Section C: Looking Ahead

What life cycle stage are we seeking to move toward next?

What would success look like in that stage?

What decisions, investments, or support are most critical in the next 6–12 months?

Which partner(s) can lead and/or support this movement?

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PART 3: Stage-Specific Capacity Assessments

Use the assessment for your **current or emerging stage**. Rate each statement using the scale below.

Rating Scale

1 = Not in place

2 = Minimally in place

3 = Partially in place

4 = Mostly in place

5 = Fully in place and effective

N/A = Not applicable

Start-Up Stage Capacity Assessment

Coordination Capacity

- Backbone or administrative support exists to convene partners and manage meetings
- Facilitation supports trust-building and shared understanding
- Communications and basic coordination are handled consistently

Collective Purpose and Goals

- Individual and shared interests are understood
- A shared vision, values, and purpose are explored and drafted
- Desired shared activities and outcomes are described and understood
- Collaborative agreements (e.g., MOUs, charters) are developing

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Shared Strategy and Priorities

- Early strategic priorities are identified
- Partners understand their roles and contributions

Collaborative Practices, Skills, and Tools

- Basic understanding of collaborative leadership skills are shared
- Norms for communication and participation are established

Building Stage Capacity Assessment

Coordination Capacity

- Coordination supports project management, engagement, and progress tracking
- Backbone roles are clearly defined and resourced
- Fiscal administration needs are identified and pursued
- Coordination, facilitation, and convening capacities are ongoing and adequately resourced

Collective Purpose and Goals

- A shared vision, values, purpose, goals, and functions are articulated.

Governance and Decision-Making Structures

- Initial agreements (charter, MOU, etc.) are prepared and signed
- Leadership teams and/or working groups are active
- Decision-making processes are clear and used consistently

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Shared Strategy and Priorities

- Strategic plans or roadmaps are under development to guide collective work
- Near-term priorities are identified and adopted
- Agreed-upon accountability practices support progress toward shared goals

Systems and Infrastructure

- Communication, reporting, and data-sharing systems support coordination
- Initial physical infrastructure needs are identified and pursued

Collaborative Practices, Skills, and Tools

- Partners have access to collaborative skill development and training
- A culture of accountability is emerging

Sustaining Stage Capacity Assessment

Coordination Capacity

- Coordination supports long-term strategy, learning, and scale
- Backbone capacity is stable and sustainable
- Coordination, facilitation, and convening capacities are ongoing and adequately resourced

Governance and Decision-Making Structures

- Governance supports shared leadership
- Leadership succession is planned for

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- The necessary agreements and authorities exist to accomplish priorities

Systems and Infrastructure

- Data and learning systems inform priorities & decisions
- Infrastructure efficiently supports collaborative functioning and scale

Shared Strategy and Priorities

- Strategy supports long-term outcomes and adaptive management
- Partners remain aligned

Collaborative Practices, Skills, and Tools

- Continuous learning and innovation are embedded

Renewal Stage Capacity Assessment

Coordination Capacity

- Coordination supports reflection and realignment
- Facilitation enables difficult conversations and adaptation
- Coordination, facilitation, and convening capacities are ongoing and adequately resourced

Shared Strategy and Priorities

- Strategy is being refreshed collaboratively
- New directions are explored

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Governance and Decision-Making Structures

- Governance can adapt to new priorities
- Decision-making authority is clear during transition

Systems and Infrastructure

- Systems support feedback, learning, and innovation

Collaborative Practices, Skills, and Tools

- Adaptive leadership and change management training is provided and skills are present

Collective Purpose and Goals

- A shared vision and purpose are renewed
- Desired impacts are understood and agreed upon
- Existing agreements (e.g., MOUs, charters) are revised or retired

Decline Stage Capacity Assessment

Coordination Capacity

- Coordination supports honest reflection and transition conversations
- Backbone or administrative support manages transition or closure

Governance and Decision-Making Structures

- Clear authority exists for transition or closure decisions

Systems and Infrastructure

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- Documentation and reporting systems capture lessons learned
- Knowledge transfer processes are in place

Shared Strategy and Priorities

- Shared understanding exists about next steps

Collaborative Practices, Skills, and Tools

- Conflict navigation and sense-making skills are present
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Cross-Cutting Capacity Areas (binding elements)

The following three cross-cutting capacities (or enabling elements) apply across all life cycle stages and should be assessed regardless of stage. The items within each capacity area are designed to be thought-provoking. If there are other items that better align with your collaborative's purpose and goals, feel free to revise or add.

Rate each statement using the scale below.

Rating Scale

- 1 = Not in place
- 2 = Minimally in place
- 3 = Partially in place
- 4 = Mostly in place
- 5 = Fully in place and effective
- N/A = Not applicable

Inclusive Culture

- Inclusion and belonging are intentionally embedded in participation and decision-making

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- Diverse partners have meaningful voice and influence in shaping outcomes
- Participation is broad and not tokenized; influence is not concentrated among a few

Meaningful Relationships

- The collaborative grows and supports a culture of reciprocity that builds trust, connection, cultural awareness, and mutual respect
- Relationships enable facilitation of best practices, behaviors, and mutual accountability
- Long-term success is supported through sustained attention to collaborative infrastructure, culture, leadership, and shared problem solving

Collaborative Mindset

- Partners demonstrate collaborative leadership and shared ownership of outcomes
- The collaborative demonstrates and communicates successes and lessons showing how collaborative efforts lead to on-the-ground environmental, social, and economic outcomes
- Partners identify strongly with the collaborative and see themselves as stewards of its shared mission
- Collective goals consistently take precedence over individual organizational interests in decision-making

Partners should score these cross-cutting capacities using the same 1–5 scale before completing the stage-specific assessment below.

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PART 4: Guided Scoring and Interpretation

This section provides a clear and partner-friendly way to use scores to generate insight and action. Scores are not intended to label or judge a collaborative. They are tools to surface patterns, prompt dialogue, and guide investment decisions.

Step 1: Identify Your Primary Life-Cycle Stage

Using the Life-Cycle Stage Rubric:

- For each row (dimension), place a “1” in the column that best reflects your current reality.
- Add the totals for each stage.

Stage Score Summary

Stage	Total Points
Start-Up	_____
Building	_____
Sustaining	_____
Renewal	_____
Decline	_____

How to Interpret Stage Scores

- The highest score indicates your **primary life-cycle stage**.
- Two close scores suggest you are in a **transition between stages**.
- High Reinvent and Decline scores together may indicate a **pivotal moment requiring intentional choice**.

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Use this result to determine which stage-specific capacity assessment to prioritize.

Step 2: Score Stage-Specific Capacities

Complete the capacity assessment for your primary (or emerging) life cycle stage.

After scoring each statement:

- Calculate averages by capacity area using the life cycle stage tab for your collaborative (e.g. start up, etc.) in [this worksheet](#). Guidance is provided in the instructions tab.
- Identify which areas fall below 3.5. [Note: please download the worksheet to your computer before entering data]

Lower scores typically indicate:

- Structural gaps (governance, systems, coordination)
- Skill gaps (leadership, facilitation, adaptive capacity)
- Alignment gaps (shared strategy, clarity of roles)

Using Results

- Identify **lower-scoring capacities** (e.g., below 3.5) as priority gaps
- Align capacity-building efforts with your life-cycle stage
- Use results to inform strategic planning, funding, or technical assistance
- Revisit the assessment during major transitions or annually

This assessment is intended to support intentional, stage-appropriate collaboration and capacity investment across the full life cycle. Scores are meant to highlight patterns and gaps, not to produce a single “right answer,” and are designed to prompt reflection and dialogue.

Step 3: Score Cross-Cutting Capacities

Rate each statement in the Inclusive Culture, Meaningful Relationships, and Collaborative Mindset sections using the 1–5 scale:

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Calculate the average for each of the three cross-cutting capacities.

Cross-Cutting Capacity Score Guide

- **4.5 – 5.0** = Embedded strength and cultural asset
- **3.5 – 4.4** = Functional but could be deepened
- **2.5 – 3.4** = Capacity gap that may limit impact
- **Below 2.5** = Priority area for intentional investment

These capacities influence success across all lifecycle stages

Similar to the stage-specific capacities, those below 3.5 could be viewed as priority gaps

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