



CONFLUENCE  
POLICY & STRATEGY  
GROUP

# The Power of **Collaborative Decision Making**

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Breaking the gridlock on  
even the most complex  
and contentious issues.



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Denver, CO | Wilmington, NC

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## About Confluence Policy & Strategy Group

Confluence PSG is a strategic advisory firm specializing in collaborative processes that drive meaningful change across public, private, and nonprofit sectors. We partner with government agencies, corporate leaders, foundations, and community organizations to design and lead efforts that address complex challenges, align diverse stakeholders, and produce results that are both actionable and lasting. From large-scale system change to internal organizational realignment, our work is rooted in thoughtful design, deep listening, and a practical understanding of how decisions are made and implemented.

Confluence PSG's services include facilitation and management of multi-party initiatives, strategic planning, conflict navigation, negotiation management, organizational assessments and stakeholder engagement. Whether navigating contentious issues, assessing internal dynamics, or charting a new strategic direction, we bring a combination of best-in-class process design, sector-spanning experience, and a commitment to clarity, inclusion, and forward movement.

The Confluence team brings a unique combination of experience helping leaders address complex issues, in-depth of expertise engaging both community and institutional stakeholders and

experience in both the public and private sectors. Our experience is not limited to the theoretical or any single system. The Confluence PSG team has supported collaborative decision making, conflict navigation, strategic planning and stakeholder engagement efforts at the town, county and state levels, led efforts across multiple private sector industries, facilitated and managed dozens of task forces and advisory bodies, prepared reports for legislative, executive and regulatory bodies based on those initiatives and helped leaders identify next steps to advance the work. This experience and the effectiveness of our team making progress where other efforts have stalled is why leaders in government and business turn to Confluence PSG for executive facilitation services.





01

## Now More Than Ever: **The Growing Need for Collaborative Processes**





We are living in a moment defined by complexity, mistrust, and political gridlock. The stakes of public decisions are high, but so are the risks of inaction. Communities are polarized. Public confidence in institutions is low. The path forward is often unclear, and even when it is, leaders face enormous pressure from all sides.

This isn't just a communications challenge. It's a structural one. Traditional decision-making processes are falling short of what today demands. What we need now are Collaborative Decision Making Processes (CDMPs) built for this era: processes that acknowledge conflict, harness diverse perspectives, and move people toward shared solutions.

## The Case for Collaborative Decision Making Process (CDMPs)

CDMPs aren't a luxury or a public relations exercise. They are a critical governance tool, especially when the issues are contentious, the stakeholders are misaligned, and the path to resolution isn't obvious.

Leaders turn to CDMPs when:

-  Politics stall policy progress
-  Stakeholders refuse to engage unless they're heard first
-  The technical solution is clear, but social and political buy-in is fractured
-  Communities demand transparency, participation, and trust

Done right, CDMPs don't avoid friction. They use it. They turn disagreement into direction and surface ideas that couldn't emerge in more insular spaces. And they create legitimacy, not just for the decision, but for the process that led there.

## Why It Matters Now

At a time when the public is questioning whether government can still solve problems or even hold a productive conversation, leaders need more than expertise. They need process credibility. They need ways to bring the right people to the table, build trust, and move from ideas to outcomes.

In a hyperconnected, high-stakes world, collaboration isn't optional. It's essential infrastructure.

## Our Philosophy and Approach

At Confluence PSG, we've seen what happens when these processes are designed with rigor and intention. We've helped governors, cabinet members, legislators, agency directors, non-profit and private sector leaders navigate issues where politics, policy, and people collide. And we've done it in red states, blue states, and everywhere in between.

What sets us apart is not just our facilitation. It's our depth in understanding both "small p" and "Big P" politics. We know how to manage the undercurrents of power and conflict in the room while keeping the process moving forward. We believe that:

***There is rarely traction without friction but that friction must be a tool for progress, not a state of being or an outcome.***

That's how we design CDMPs. That's how we lead them. And that's how we get results that last.

## **If You're a Leader Facing a Hard Problem...**

This is your moment. You don't have to solve it alone, but you do need a process that can.

The CDMPs we design aren't one-size-fits-all. They're tailored to your issue, your state, your people, and your political context. They're built to create alignment where there was none and to move decisions from gridlock to action.

Let's design something that works—for your mission, your team, and the people you serve.





# 02

## Task Force & Work Group 101: **Key Elements to an Effective Process**

If you work in government at any level, advocate on policy issues or work with government agencies regularly, you've likely heard about or even been part of a specially formed group addressing one or more complex issues. The names may change depending on the purpose, the authority it holds or even just who created it but whether it's called a work group, task force, blue ribbon committee or special commission, these collaborative decision making bodies have incredible potential to inform bold, consensus based action.

Realizing the potential of these groups requires a thoughtful, intentional and strategic approach to every aspect of their creation, structure, management and work. Done well, these efforts can lead to breakthrough progress in finding common ground on some of the most contentious and complex issues. They can be the nexus of a strong base of support for system change, the key to buy-in among diverse stakeholders and the backbone of sustainability for new approaches, policies, systems and solutions. If any aspect from creation to facilitation misses the mark, they can at best become a frustrating waste of time and at worst, can lead to distrust in the sponsors

and leaders or lead to even more divisiveness.

The good news is that getting collaborative decision making processes right isn't itself a complicated process. With an appropriate amount of forethought and planning, purpose driven structure and intentional membership led by the right support team, We've seen common ground reached among people who have long histories of opposition.

In the 15+ years we have been facilitating groups, I have seen first-hand the best the approach can yield and we've seen the worst examples of poorly designed or run efforts.

From smartly designed and well run processes, we've seen:

- Groups and individuals who fundamentally disagree on key issues set aside their differences to find the issues they agree on rather than focusing on where they differ;
- Consensus reached after years of impasse because a leader was willing to put people with radically different ideas together and trust a process;
- Research driven conversations change opinions on even deeply held beliefs;
- Experts and affected stakeholders come together to make progress where partisan bodies were not able to get past ideological gridlock; *and*
- Historically marginalized, disproportionately affected and voices in the minority on an issue be given an equal seat at the table and opportunity to influence.

On efforts that missed the mark in design or management, we've seen:

- The unnecessary politicization of processes that led to even greater distrust and dysfunction;
- Lack of clarity on the mission, authority or decision-making process that turned passionate group members frustrated and that wasted the opportunity presented by their involvement;
- Bias in the design and substance of conversations, the composition of the group and the topics, experts or ideas given space that limited the boldness and potential of the work;
- Heavy handed involvement by the executive sponsors of the group and tone setting that led to skepticism of the authentic interest in diverse viewpoints;
- Bias in the project leaders and facilitators that either sent a message to stakeholders of a dominant and preferred viewpoint or that twisted the group's work to fit their beliefs and agenda.

All of these positive outcomes are possible in nearly every scenario and each pitfall was 100% avoidable. We've engaged over 15,000 stakeholders, planned close to 500 meetings and managed

more than 50 work groups and task forces that have led to over 100 changes in policy and regulations.

What made each of these possible and what have we come to believe are the most critical elements to success in a work group or task force?

- 1 Structure.** Defining the role, governance, decision-making process, authority and scope of inquiry with intentionality and clarity of outcomes.

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- 2 Membership.** Designing the composition of the group to ensure diversity of perspectives, expertise on the subject matter and trust among affected stakeholders.

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- 3 Process Design.** Creating a process that drives effectively to the outcomes, is efficient in the use of participant time, anticipates the unexpected and builds credibility for the group's recommendations.

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- 4 Management & Facilitation.** Allocating appropriate resources for the project team and ensuring the skill, neutrality and expertise of group facilitators.

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We don't just believe task forces or work groups can be effective, we believe they are the most effective tool we have to advance meaningful change on the most complex and contentious issues we face in our towns, states, nation and global community. That's why we're launching this series of blog posts from our team addressing each of these elements and later this fall will publish a white paper on best practices for task forces and work groups.

We hope by sharing what we've learned, work group and task force sponsors, leaders and participants will be able to design, manage and contribute to more effective processes on the issues they face. If you are considering forming any type of collaborative decision making body or process, we would be happy to schedule a time to talk and to be a thought partner to your effort.



# 03

## Task Forces & Work Groups: When & Why to Utilize Them

As professional facilitators and conveners for all forms of consensus building efforts, we are big believers in their potential. With experience managing efforts across the U.S. on nearly every policy topic, and with efforts at the city, county, state and regional levels, we have plenty to share about best practices in the facilitation, design, structure, and membership management of task forces and work groups.

As we discussed in the prevision section, our team has had the good fortune to be involved in some truly remarkable processes that hit all of these elements just right (or were able to adjust course to do so). We've also seen and felt the frustration when an overlooked detail or poorly designed process undermined the potential and with it, the support of stakeholders.

Design, structure, membership, management and facilitation will be critical considerations for any collaborative decision making effort but there is one foundational question that must be answered first that will inform everything else:

## ***Why a task force or work group vs. simply just empowering system leaders to develop the solutions?***

In our experience, there are six primary reasons to utilize a Collaborative Decision Making Process or CDMP to tackle complex or contentious issues whether in policy, practice, regulation or system design:



### **Diversity of Perspectives.**

Utilizing any form of CDMP rather than tasking a single leader or internal group to examine options presents an opportunity to ensure the broadest possible range of ideas are brought to the discussion. Even the most well-intentioned leaders are subject to unconscious bias and the older the system, the more entrenched stakeholders are, and the more difficult it can be to break away from “group think.” The benefit of including a diversity of perspectives should also be leveraged to ensure those with the institutional knowledge are part of the process and are able to bring an understanding of why things have been a certain way or what has been tried in the past.



### **Breaking Impasses & Gridlock**

When other deliberate efforts have failed to find consensus in legislative and governing bodies, forming a CDMP can provide a fresh start and an opportunity to leave talking points and rhetoric aside as the group embraces a shared commitment to finding where they can agree rather than on sound bites or reasons to disagree.



### **Incorporation of Expertise.**

CDMPs present a great opportunity for all involved to learn from those with in-depth knowledge, expertise or lived experience relating to the underlying issue. Whether through experts who serve as members of the group or as presenters and panelists or through the sharing of exemplars and research, these neutral forums provide an opportunity for fact and experience to be shared.



### **Stakeholder Driven.**

Among the strongest arguments for utilizing some form of CDMP is the opportunity to have systems, rules, regulations and policy designed by those most knowledgeable and most affected by the decisions. Convening those involved in managing or implementing the underlying system and those who will be the consumer, user or most affected by it together, allows for the candid sharing of perspectives that will be critical to its success. Just as valuable, it means the recommendations or solutions developed are much less likely to be viewed as a “top down” or a heavy-handed approach by decision makers.

### Consensus Based Outcomes.



It is difficult to overstate the power of ideas or solutions that come from people with very different perspectives, beliefs or experiences finding common ground. When leaders are able to design or implement new systems and policies advanced by these processes, they come with greater credibility and often have a head start in the buy-in of key stakeholders.

In considering whether or not to use a work group or task force, there may not be opportunity for all six of these conditions or even a need for all of them to be fully integrated. If the issue being addressed would benefit from most if not all of these, then a CDMP should be seriously considered.

An important note of caution: There is perhaps nothing as damaging to a decision making process or the credibility of its sponsor as one done with a thumb on the scale or a lack of authentic openness to the diversity of perspectives and the outcomes they may produce. If you are genuinely open to the recommendations of a consensus based collaborative process, a well designed CDMP can make breakthrough progress where other efforts have stalled.

In the next section, we'll explore some of the best practices I mentioned like how to design, structure, manage and effectively facilitate these groups. Later this fall, we'll be releasing our white paper that draws on our team's experience managing over 25 CDMPs, facilitating over 500 meetings in the process and engaging over 15,000 stakeholders in efforts that have informed over 100 policy, regulation and rule changes.





04

## 7 Keys to Structuring a **Successful Task Force or Work Group**

On some of the most complex, contentious and critical issues facing government, communities and businesses, we've seen stakeholders with very different views come together to make meaningful progress where other efforts have stalled out or been unable to find common ground. In previous sections, we wrote about the basics of Collaborative Decision Making Processes (CDMPs) and when or why to use such a process.

Having managed dozens of work groups and task forces across the country on issues ranging from fiscal policy, strategic planning and transportation funding to education, school safety, criminal justice, public safety and most issues in public policy, we've seen the incredible potential for breaking through gridlock when these processes are well designed and run. We've also seen the missed opportunities for progress when they are not properly designed or positioned for success.

The good news is that most of the issues that can derail or undermine the effectiveness and the trust in these processes can be avoided by following a simple, seven step roadmap when

creating the process. As you'll see below, most of these involve defining the work, role, scope and approach clearly up front. Whether created through legislation, executive action or other means, those creating any Collaborative Decision Making Process should be as specific as possible on each of these pieces while leaving an appropriate degree of leeway for new thinking or ideas to emerge without creating unnecessary windows for scope creep or distraction from the key purpose of the group.

## 7 Keys to Structuring a Successful Task Force or Work Group

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1. Define Scope of Inquiry or Issue;
2. Define the Purpose & Outcomes;
3. Define the Approach;
4. Define the Structure & Membership;
5. Define the Authority or Agency;
6. Define the Decision Making Process;
7. Consider the Operational Needs.

The foundation of each group – its membership, structure, timelines for work and operations – should all be purpose-built in support of the intended scope of inquiry and the outcomes.

### 1. Define Scope of Inquiry or Issue.

The scope of inquiry needs to leave minimal room for whether an issue or sub-issue is or is not intended to be addressed. The more narrow the scope of inquiry, the deeper the group can effectively explore it. For example, creating a Task Force on Housing that has a Scope of Inquiry of “Making recommendations to improve access to home ownership” could leave open the scope to everything from low-income or affordable housing and workforce housing to issues of land-use, lending requirements, zoning and construction litigation. These may all need to be addressed but that is likely a bigger charge than what can realistically be effectively addressed by a time-limited process. It would likely be better to narrow that focus to “Research and identify specific strategies to increase the inventory of and access to purchase housing for first-time buyers and entry to mid-level positions in the state’s top growth industries.” While this could still be a broad inquiry, it becomes more manageable. Alternatively, a Working Group or Task Force on Housing Access could be formed with intentionally defined subcommittees tasked with deep explorations of more narrow topics that all filter back up to the umbrella body.

## 2. Define the Purpose & Outcomes.

Be very clear – and articulate in the forming documents – what the purpose is of any work group, task force or committee. In this step, it's important to lay out for example, whether the group is simply researching an issue, examining options and gathering input or if they are being tasked with developing specific solutions, proposals for change or draft regulations, legislation or internal policies. In our housing example, you might say “The purpose is to identify specific strategies to drive expanded home ownership by middle-income families and first-time home buyers. A primary purpose of the group’s work is to support the economic development strategy of attracting new employers to the region whose employees will require access to housing. The group will publish a report with recommendations for actions that can be taken at each level of government, by employers and other third parties to advance the strategies identified including specific next steps to be taken.” Alternatively, there could be a group formed or a phase of a group’s work that is more general such as “In year one, the Workforce Housing Task Force will conduct an inventory of available housing by price point, engage with employers and economic development officers and others to prepare a gap analysis and comprehensive report on current and projected housing needs for people earning 100 – 130% of the median household income.”

## 3. Define the Approach.

Building on the purpose and intended outcomes, it is important to define the approach to the work, particularly the amount of opinion vs. empirical research and of qualitative vs. quantitative input to be gathered. There are appropriate places for each approach and many processes will incorporate both but it is helpful to address this in creating any Collaborative Decision Making Process. One key component of this is whether the group being created is intended to be the sole source of input and decisions made through their examination of the facts, conditions, available research or information on the issue. Alternatively, it could be expressly stated that “the group shall engage a broad range of stakeholders with lived experience, expertise and professional knowledge to inform their discussions and recommendations” or, at a minimum, that the “group is authorized and encouraged to solicit



presentations by subject matter experts to inform their deliberations.” The approach ultimately needs to be clear on whether the group is charged with serving as a consensus building and opinion sharing initiative, a data-collection and fact-finding enterprise or a combination of these.

#### **4. Define the Structure & Membership.**

Along with a clearly defined Scope of Inquiry, the Structure and Membership are critical elements of a successful process. The Structure of the group should address issues like whether there is a chair, vice-chair or other official roles and what specifically the rights, roles and responsibilities are for any such positions. Group creation is a good time to initially address the use of subcommittees if that is known. You may identify each such subgroup as part of the establishment of the group or define the process and powers of the group for doing so.

Membership should be designed to serve the Purpose, the Outcomes and to provide the perspectives needed to support the Scope of Inquiry. Membership will look very different for every group but attention should be paid to ensuring representation by:

- a. Those with direct personal, lived or professional experience with the issue;
- b. Those with subject-matter expertise;
- c. Those most directly affected by the issue or system;
- d. Those historically underrepresented in discussions;
- e. Those whose opinions may be in the minority;
- f. Those who will have responsibility for implementing, acting on or advancing the changes.

In addition to defining who the members are, the process for selecting and, if necessary, replacing any members should be included in the initial group design. It’s also important to be clear about how membership in the primary group intersects (or not) with subgroups or subcommittees. Will each subgroup be chaired by or have any members from the top-level group? How will membership be established?

Finally, who will design, manage and run the work of the work group or task force? Will staff be assigned? Will a third party be contracted? What is the role of the chairs? Do they serve in a primarily parliamentary role or have a larger role driving the direction of the work? Are they voting members? Will a third party be contracted to facilitate, manage logistics, provide research or other support? In most cases, a combination of these will be the most effective to draw on the wide range of skills and expertise necessary.

**Subsequent sections in this paper cover selecting a facilitator (internal or external) and the important elements of the planning and day-to-day management of any Collaborative Decision Making Process.**

## **5. Define the Authority or Agency.**

As simple as it is, this is one of the most often overlooked pieces and a place where ambiguity can undermine the process or member support for the outcomes. Be very clear up front what authority the Collaborative Decision Making Process being created has and does not have. Name with clarity what agency they have for advancing change and what will be done with any findings or recommendations. As with other issues, there is no one size fits all and the specific issue, current dynamics and external factors all have to be considered. What is most important is the transparency with members and the public or interested stakeholders. The role or authority can range from simply publishing a report sharing the group's findings or recommendations to formally empowering the group to produce draft regulations, policies or legislation to be introduced, considered, voted on or directly adopted by an oversight body. In between these are a wide range of roles that can include publishing reports to inform executive or legislative decision making and advising officials on next steps based on the group's work.

## **6. Define the Decision Making Process.**

To foster trust in the process and its outcomes, it's important to be transparent about how decisions will be made and what will happen when there is not unanimous agreement. The creation stage is also the time to be strategic not only about getting to consensus or a recommendation being voted forward but also about the sustainability of any changes or recommendations. Creating documents or, at the latest, initial discussions of the group, must define each decision making process and vote threshold. Details here are crucial. Which actions of the CDMP require a vote taken with at least a quorum present? What percentage of membership will constitute a quorum? What is the voting requirement for decisions by the group? Do some decisions – like formal recommendations – require a super majority greater than 51%? What happens if there are insufficient members in attendance?



This is not just theoretical! We saw one group decide at an early meeting that a quorum and a super-majority were required for formal recommendations. They had also decided that changing this standard required a vote of  $\frac{3}{4}$  of the members with no proxies allowed. When it came time to vote, they could not get  $\frac{3}{4}$  of the members to attend the voting meetings and by their own rules, could not change the use of proxies or the threshold to change the voting requirement.

As much as we strive to find consensus on every decision, reaching unanimous agreement on complex and contentious issues among stakeholders with strongly held, often opposing views is not always possible. To honor the different views, it's important to be clear up front about how dissenting opinions will be managed and what the expectations are of members beyond the group voting. This means determining whether a minority or dissenting view will be included in the group's report or presentations. There are also important considerations about the rights of members who disagree with the findings to be able to share their views if official action or votes may be held to advance the majority's recommendations.

## **7. Consider the Operational Needs.**

Regardless of who creates the Collaborative Decision Making Process, it's important for it to be housed somewhere appropriate, that the role of any agency, body or entity where it sits is clearly defined and that the members and the public have a clear understanding of what level of autonomy the group is granted to do its work. As with other elements, there are no universal right or wrong answers but consideration should be given both to the technical needs of the group and to optics of where it is housed. Minimizing any actual or perceived bias or undue influence is important though there will be times that the most appropriate place for a group to exist may lead to some stakeholders having concerns. In these cases, it is important to be very clear about what the role of any such agency or department is and is not in the work of the CDMP and to be explicit about the autonomy of the group.

Creators or executive sponsors of these groups should consult with staff who may be asked to support the process and with colleagues who have led or been involved with similar efforts to consider the budget and funding needs. An upcoming section in this report will address the use of outside facilitators including when this may or may not be the best approach and considerations for selecting a facilitator. Even when an outside facilitator is engaged, there is a need for some staff to support and coordinate the work. Depending on the Scope of Inquiry and Structure, this could be as little as  $\frac{1}{4}$  of a full-time employee (FTE) time up to 2, 3 or more FTEs for particularly robust processes with aggressive timelines.

The internal staff time, third party supports such as facilitators, direct costs like venues, catering, research, outside expert travel or fees and any reimbursements for travel or time to members should all be included when developing the budget or fiscal note for any Collaborative Decision Making Process.

The final crucial factor for the success of any CDMP is how the group is managed, facilitated and run. Each process will have its own unique factors but all will be largely dependent on the decisions made by those managing the process. From the arc of conversations and the strategic design of agendas to the facilitator's ability to engage every member and working style and to be genuinely trusted by all involved, the management and facilitation are the glue that will hold the process together. In the next section, we dive into best practices for staffing and facilitation of collaborative decision making and consensus building processes.





05

## The Engine Behind the Process: **Managing an Effective CDMP**

On some of the most challenging issues facing communities, agencies, businesses and governments, the way a Collaborative Decision Making Process (CDMP) is managed can make or break its outcomes. In previous sections, we covered the basics of CDMPs such as work groups and task forces along with when and why to use a CDMP and how to structure it. While a thoughtfully structured task force or work group sets the foundation, the effectiveness of the process itself hinges on how it is run, facilitated, and sustained. This section outlines key best practices to manage and operationalize a CDMP once it's up and running.

### Roles & Responsibilities

Clarity of roles is essential. Who runs the day-to-day logistics? Who steers the process? While

chairs or co-chairs may serve as public-facing leaders, it's often a facilitator who will design the continuum of discovery and discussions, facilitate the conversations and keep the group on track. An administrator or project manager also plays a critical role ensuring everything from meeting logistics to agendas, guest presenters, meeting notes or minutes and coordinating with any subject matter experts or others who will provide input. Sharing these roles and responsibilities with each member of the CDMP helps everyone understand who is responsible for setting agendas, leading discussions, capturing decisions, communicating with members, and tracking progress.

## Agenda & Process Design

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Every meeting must be designed with purpose. The arc of conversations should build momentum and insight over time—not exhaust participants. Avoid meetings that feel like updates or that revisit the same ground. Instead, sequence discussions to explore issues thoroughly, elevate shared priorities, and use tools like straw polling, small groups, or expert panels to deepen analysis. When participants are being exposed to new information, the process should be designed to allow time to learn, to process, to explore together and to reflect on before pushing for any proposals, recommendations or decisions. Face-to-face time, whether in person or virtually, should be utilized for tasks that benefit from the group dynamic. Conversely, tasks like reviewing a power-point, background information or research, can be done as pre-work and followed by discussions or clarifying questions when the group convenes.



## Meeting Cadence & Length

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The rhythm of meetings matters. Meet too infrequently, and momentum stalls. Too often, and participants may burn out. Match frequency to the complexity of the issue and the time available. Meeting length and format is equally important. Virtual meetings allow participants to reduce the interruption to their day and are more convenient for participants who are spread out geographically or who have barriers to traveling. Some elements of the CDMPs do benefit from in-person time when it's practical. They are great for building trust and personalizing the discussion, particularly

when participants don't know each other or are coming to the conversation with opposing views. In-person work-sessions are also effective forums for longer deep-dives or sessions like brainstorming where group activities, white-boards and sticky notes can advance the work. For both virtual and in-person, the length of meetings matters. It's tough to keep people truly engaged for more than three hours in a virtual meeting even with breaks. For in-person meetings, with a lunch break and some interactive elements, six hours is about the limit before engagement fades.

## Documentation & Resources

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All participants should have easy access to all materials they need to prepare for upcoming meetings, reflect on past discussions or learning sessions and review presentations or research. There are several free or low-cost platforms like Google Drive and Dropbox that allow CDMP project managers to organize and share materials. For enhanced security, capacity or ease of access, a dedicated data-room or other file and information sharing platform is another option.

If some or all of the work of the CDMP is required or intended to be accessible to the general public, the project manager will need to consider this in determining how things are distributed, shared and posted. This may call for separate folders or platforms for the public, CDMP members and the CDMP project team. For all involved transparent documentation builds trust—recaps, draft recommendations, and summaries should be clear, accessible, and timely.

## Avoiding Common Pitfalls

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Watch out for executive micromanagement, scope creep, ambiguous decision-making rules, or under-resourcing. Many groups falter not from disagreement but from confusion or fatigue. Proactively name these risks and set systems to avoid them.



### Takeaway

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Management is where intention meets implementation. The most elegant structure will fail without strong process leadership, consistent engagement, and a clear arc of progress.

In the next section, we'll explore the importance of the team supporting the CDMP and where the CDMP is based.



## Assembling the Right Team

### Beyond the Members: Building the Team That Makes CDMPs Work

When people think about launching a work group or task force, most of the attention goes to who will be at the table. But the people behind the table—the staff, experts, managers, and facilitators—often determine whether the process succeeds or stalls out.

Collaborative Decision Making Processes (CDMPs) require more than just participants. They require a support structure that is designed with the same intention and clarity as the process itself. In this post, we explore what it takes to assemble the team behind a CDMP: how to house it, staff it, and set it up for success.

### Where to Base the CDMP

Where a CDMP is ‘housed’ shapes everything from logistics to credibility. The question of location is about more than budget. It’s about trust, access, and optics.

**Internal Housing:** Many CDMPs are based within government agencies, executive offices, or legislative branches. These offer ready access to data, staff, and decision-makers. But they may also raise concerns about neutrality, especially if the host agency has a stake in the outcome.

**Third-Party Housing:** Sometimes, it's best to place the CDMP in a nonprofit, university, or other neutral entity. This can help establish independence and build trust among skeptical stakeholders. But it also requires clarity about roles, oversight, and how the CDMP connects back to the decision-making body.

There's no one-size-fits-all answer. But this decision should be made intentionally and communicated transparently to members and the public.

## What Role Should the Sponsor Play?

It's equally important to define what the sponsoring body—whether a state agency, governor's office, or legislature—will and won't do during the CDMP.

- Will they provide administrative support only?
- Are they offering subject matter expertise?
- Will their staff attend and participate in meetings? Present research? Draft materials?

There's a big difference between a sponsoring body that quietly supports logistics and one that actively shapes content. If the sponsor is perceived as steering the outcome, trust in the process may erode. If they're too hands-off, the group may lack direction. The key is clarity and consistency, both internally and externally.



## Do You Need Subject Matter Experts or Researchers?

In most CDMPs, yes.

Experts play a critical role in grounding discussions in fact and elevating the group's understanding

of complex issues. But just like participants, experts should be selected with purpose:

- Do you need presenters, panelists, or ongoing advisors?
- Should expertise come from academics, practitioners, people with lived experience, or a mix?
- Do you need researchers to gather or synthesize data in real time?

And just as important: Are your experts seen as neutral? Are you balancing perspectives?

CDMPs fail when they're built around a narrow lens. A well-curated group of experts expands the lens without narrowing the options.

## Facilitator: The Orchestrator of Alignment, Action and Success

You can have the best-designed structure and the right team, but without the right facilitator, your process will stall or worse, implode.

The facilitator isn't just a moderator. They are:

- A process designer
- A conflict navigator
- A relationship manager
- A translator across competing perspectives
- A protector of trust



In the next section,, we'll unpack what makes a facilitator effective in high-stakes, high-conflict environments and how Confluence's approach sets us apart.



### Takeaway

Behind every effective CDMP is a team of people making it work, many of whom will never be in the spotlight. From where the group is housed to who supports it and who facilitates it, these choices define the experience for members and the credibility of the outcomes.

If you're planning to launch a task force or work group, don't stop at the member list. Build the right team to support the work and the outcomes will follow.

Coming up next: Choosing the right facilitator and why that decision is more important than you think.



# Selecting the Right Facilitator

## More Than a Moderator: Selecting the Right Facilitator for a CDMP

If you're launching a task force or working group, one of the most important choices you'll make is selecting the facilitator. Too often, this decision is treated as a logistical one—about who can “run the meetings.” But in Collaborative Decision Making Processes (CDMPs), that bar is far too low.

CDMPs are designed to tackle complex and often contentious issues. That means the facilitator must do more than manage time and take notes. They must be able to read a room, to navigate politics, build trust across stakeholders, and lead a group toward aligned, actionable outcomes.

If you're hiring someone to “keep things moving,” you may be underestimating what's required.

## Internal vs. External Facilitation

Some agencies or organizations consider facilitating CDMPs with internal staff. In some cases,

that can work. But in most, it introduces challenges—real or perceived—about neutrality, authority, and credibility.

Internal facilitators are often seen as too close to the issue or too aligned with agency interests. Stakeholders may hesitate to speak candidly, fearing political consequences or institutional backlash.

External facilitators, when chosen well, bring neutrality, authority, and a broader lens. They're often better positioned to manage conflict, balance power dynamics, and push the process where it needs to go.

That said, not all external facilitators are equal. And not all are right for CDMPs.

## The Biggest Misconception About Facilitation

Facilitation has become a catch-all term. Today, nearly anyone who hosts a meeting or runs a retreat might call themselves a facilitator.

But CDMPs aren't about hosting meetings. They're about solving difficult problems in high-stakes environments. That calls for a very different kind of leadership.

Think of it this way:

- A meeting emcee sets a friendly tone and keeps the agenda moving.
- A moderator manages airtime and Q&A.
- A strategic facilitator, like the ones CDMPs require, does all that and also:
  - Designs the process
  - Navigates political tensions
  - Surfaces unspoken resistance
  - Guides tough conversations
  - Helps stakeholders find common ground
  - Holds participants accountable to the purpose and the public



The work is as much about group dynamics, conflict resolution and relationships as it is about agendas and timing.

## What to Look for in a CDMP Facilitator

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A skilled CDMP facilitator brings more than warmth and polish. Look for someone with:

- Political fluency – They must understand policy, governance, and the political stakes at play.
- Stakeholder credibility – They should be seen as a peer, not an outsider or observer.
- Substantive literacy – They don't need to be the expert, but they should understand the terrain.
- Comfort with conflict – They must be steady in tense moments and know how to de-escalate.
- A track record of results – Can they point to real-world outcomes from complex processes?

## Red Flags to Watch For

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Not every facilitator is equipped for CDMPs. Here are some signs that someone may not be the right fit:

- They rely on vague language about “creating space” without offering a path to resolution.
- They emphasize process over outcomes.
- They struggle to command a room of senior leaders or big personalities.
- They flinch in the face of disagreement.
- They treat neutrality as passivity rather than principled balance.

## Why Confluence is Different

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At Confluence, we don't just “run meetings.” We're brought in when the stakes are high, the issues are politically charged, and/or the standard process has stalled.

Our facilitators are:

- Former policy leaders and private-sector executives

- Trusted by both sides of the aisle in states across the country
- Skilled at resolving gridlock without alienating stakeholders
- Comfortable navigating both the “little p” and “Big P” politics of any room

We bring the strategy, credibility, and calm resolve needed to move complex groups toward shared solutions.



## Takeaway

The success of your CDMP may hinge on the person guiding it. Don't settle for someone who can keep time or follow a script. Invest in a facilitator who can help you navigate conflict, build trust, and get results.

In the next section, we turn to how to build a CDMP membership that aligns with your goals and expands your impact.





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## Choosing the Right Participants

### Who's at the Table Matters: Choosing the Right Participants

The success of a collaborative decision making process (CDMP) is shaped not just by what's discussed but by who's in the room. And while it's tempting to start with a stakeholder checklist or a list of usual suspects, effective CDMPs require more intention than inclusion alone.

In fact, the composition of your task force, committee, or work group might be the single most influential design decision you make.

### Beyond the Usual Stakeholders

When it comes to selecting members, many well-meaning leaders default to a version of: "Let's get one person from each major group." While inclusion is important, representation without

alignment to purpose can derail a process.

Instead of starting with categories of stakeholders, start by asking:

- What kind of work will this group need to do?
- What types of conversations will be required?
- What mindsets or expertise must be present to reach solutions?
- What kind of political, community, or institutional legitimacy will the group need?

The answers to these questions will tell you more about who should be at the table than any pre-defined list.

## Build for Dialogue, Not Theater

In today's polarized environment, it's easy to build a group that performs debate but avoids decision-making. If the group is designed primarily for optics or box-checking, expect gridlock.

Instead, look for participants who:

- Bring lived experience or institutional knowledge, but are open to other perspectives
- Are willing to engage in honest dialogue, not just deliver talking points
- Have credibility with their constituencies and enough flexibility to work toward shared solutions
- Can commit to the work, not just the title

In short: build a group that's capable of doing the hard work of listening, negotiating, and compromising. That's what a CDMP demands.



## Right People, Wrong Dynamics

Even if you've selected the right members, unbalanced dynamics can undermine the process. Watch for:

- Overpowered insiders: One or two dominant voices can suppress meaningful participation.
- Tokenized members: If members from marginalized groups are outnumbered or unsupported, their presence may appear inclusive while their input is ignored.
- Informal hierarchies: Titles shouldn't translate into outsized influence. A skilled facilitator can help level the playing field, but membership should be designed with a diversity of perspectives in mind from the outset.



## Size and Structure Matter

While there's no magic number, most CDMPs function best with 12 to 20 members. That's enough to reflect diverse views, but small enough to build trust and allow for real dialogue.

Considerations include:

- Will everyone participate equally, or will there be different roles (e.g., voting members, advisors, observers)?
- How will vacancies be filled?
- Are there term limits or rotating participation for long-running efforts?

Clarify these structures early to avoid power struggles later.

## Set the Tone Through Selection

The way you select participants communicates your values. Were people handpicked behind closed doors? Was there an open call with clear criteria? Did community leaders have a say?

Your approach should reflect the goals of the CDMP: transparency, trust, and commitment to outcomes. And the people you choose should reflect those goals too.



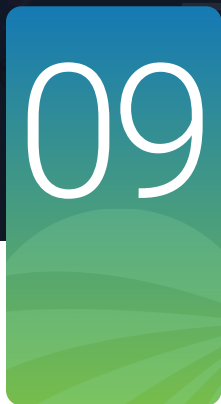
### Takeaway

Membership is more than a list of names. It's a strategic tool for shaping the tone, trust, and trajectory of a collaborative process.

When you choose participants with intention and clarity about the kind of work ahead, you increase your chances of success. And when you combine the right participants with the right facilitator, you create the conditions for breakthrough progress.

Next up: what goes into preparing your group for launch so they're aligned, equipped, and ready to get to work from day one.





# Preparing for Launch

## Get Ready Before You Begin: Preparing Your CDMP for Launch

When state leaders are ready to move forward on a collaborative decision making process (CDMP), they often want to jump straight into meetings. But if you skip the foundational steps, your first session may feel more like a stumble than a start.

A strong launch is less about event logistics and more about alignment, credibility, and trust. It sets the tone, pace, and expectations for everything that follows. Without it, even the best-designed processes can falter.

### 1. Ground the Group in Purpose

Before your CDMP members walk into their first meeting, they should have a clear answer to this question:

Why does this group exist, and what are we here to do?

That sounds simple, but in practice, groups are often launched with vague goals like “explore ideas” or “gather input.” This lack of clarity leads to confusion about what success looks like, who holds decision-making authority, and how the group’s work will be used.

A strong launch includes:

- A clearly stated purpose
- Defined outcomes or decision points
- Clarity about who will make the final decision and how the group’s work contributes to it

If people disagree about why they are meeting or what their role is, the process will stall.

## 2. Align Key Stakeholders Before You Convene

It’s a mistake to treat the first public meeting as the first step in the process. By then, expectations have already been set, alliances have started to form, and political narratives may already be in motion.

A skilled facilitator will take time before the launch to:

- Talk with key stakeholders individually
- Identify concerns, pressure points, or sources of resistance
- Clarify the process and address misunderstandings
- Get early buy-in from leaders who will need to champion or support the group’s work



This behind-the-scenes alignment work is essential. It strengthens the process before it begins and helps the group start from a position of shared understanding.

### 3. Equip Your Members

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Don't assume your members will come prepared. Most will arrive with only partial information, limited context, or prior assumptions based on their role or perspective.

Help level-set the group by providing:

- A participant packet that outlines the group's purpose, timeline, structure, and expectations
- A brief background on the issue or challenge they'll be addressing
- Information on how decisions will be made and what will happen with the group's recommendations

This step saves time, reduces confusion, and avoids early process delays.

### 4. Choose a Strategic First Session

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The first meeting of a CDMP is more than an icebreaker. It's your opportunity to:

- Set the tone and expectations
- Establish credibility in the facilitator and process
- Introduce key players to each other and begin trust-building
- Align the group around shared goals and norms

Plan this meeting with care. Avoid information dumps or high-stakes decisions. Focus on creating clarity, building early trust, and teeing up the work ahead.

### 5. Communicate Before the Meeting

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If your first communication with members is a calendar invite, you've already missed an opportunity. A thoughtful pre-meeting communication can:

- Reinforce why they were selected and why their voice matters
- Preview what they can expect and how to prepare
- Begin building relationships between members and facilitators

Even a short, well-crafted message helps participants arrive more ready to engage.



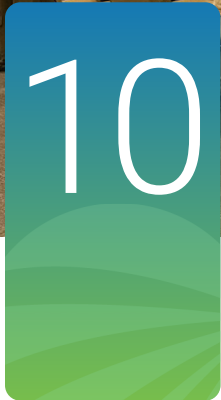
## Takeaway

Strong processes don't begin with the first meeting. They begin with careful preparation, clear communication, and strategic groundwork.

If you want your CDMP to deliver results, not just dialogue, invest in the launch. It sets the trajectory for everything that follows.

Next, we'll look at how to keep momentum going after the launch, especially in the face of setbacks, turnover, or conflict.





# Maintaining Momentum

## Don't Let It Stall: How to Maintain Momentum in Your CDMP

Launching a collaborative decision making process (CDMP) takes planning and a strategically designed approach to the work. But the real challenge begins once the first meeting is over.

Momentum fades easily, especially when participants return to full calendars, shifting priorities, and political headwinds. Without a clear plan to sustain engagement, even the most promising CDMPs risk losing credibility or collapsing into dysfunction.

Here's how to keep your process moving forward after the excitement of launch wears off.

### Anticipate the Drop-Off

Most CDMPs experience a natural dip in energy and urgency after their kickoff. This doesn't mean the group has failed. It means you need to be ready.

Recognize the signs early:

- Participants stop showing up or disengage during meetings
- Deliverables slip or conversations start to loop
- External partners begin to question whether the group is still active

Expect this dip and plan for how to respond. That's leadership, not failure.

## Make Progress Visible

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People commit when they can see the process moving. If momentum starts to wane, look for ways to:

- Share progress updates internally and externally
- Show what the group has accomplished so far
- Identify the next decision point or deliverable and make it clear how the group is getting there

Celebrate small wins. Acknowledge effort. Keep members connected to the larger goal.

## Build a Reliable Meeting Cadence

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Irregular meetings lead to missed deadlines, fragmented conversations, and forgotten context. Establish a consistent schedule and stick to it.

Make sure each meeting includes:

- A clear agenda sent in advance
- Defined objectives for the session
- A recap of prior work to re-anchor the group
- A preview of what's ahead

Consistency builds trust and signals professionalism.



## Navigate Turnover Thoughtfully

In long-running efforts, turnover is inevitable. People change roles, rotate off, or burn out.

Have a plan to manage transitions:

- Maintain clear documentation of meetings, decisions, and milestones
- Create an onboarding brief for new members
- Designate a point person to handle transitions and questions

Done well, turnover doesn't have to disrupt momentum. It can even bring fresh energy and insight.

## Revisit Purpose When Needed

When progress slows, it's often a sign that participants have lost connection to the original purpose. Before pushing forward, pause and realign:

- Restate the group's mission and outcomes
- Remind members of why they were selected and what they bring to the table
- Connect the work back to the broader stakes, whether that's policy impact, community trust, or political outcomes

Realignment isn't about repeating the kickoff. It's about restoring clarity and urgency.



## Bring the Facilitator In Early

If you're sensing drift, don't wait to act. A strong facilitator can help:

- Diagnose the root cause of low engagement
- Reset expectations or group norms

- Re-sequence the work to regain clarity and purpose

Momentum isn't just about logistics. It's about trust, structure, and energy – all things an experienced facilitator can help rebuild.



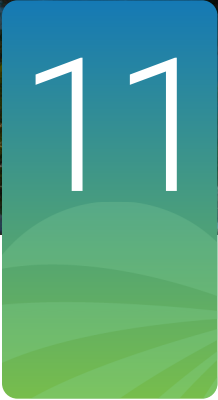
## Takeaway

Maintaining momentum in a CDMP doesn't happen by accident. It takes structure, communication, and leadership behind the scenes.

If your process starts to drift, don't panic. Get curious, reconnect people to purpose, and double down on consistency. That's what separates groups that talk from those that deliver.

Next, we'll talk about how to wrap up a CDMP in a way that maximizes its impact and sets your recommendations up for implementation.





# Closing Strong

## Don't Let It Fade: How to Close Your CDMP with Impact

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Too many collaborative efforts end with a final meeting and a vague promise to “keep in touch.” That may feel like a natural close, but it wastes hard-earned momentum and leaves participants—and their work—without direction.

A strong close matters. It's the difference between a group that made recommendations and one that made change. If you want your collaborative decision making process (CDMP) to influence policy or decisions, you have to close with intention.

Here's how.

## Clarify What's Done and What's Next

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Your final meeting is not just a wrap-up. It's an opportunity to:

- Confirm what the group accomplished
- Frame how those results will be used
- Set expectations for what happens after the process ends

Sponsors and process leaders should be clear about what decisions will follow, what actions are already underway, and what still needs attention. This reinforces that the group's work mattered and helps participants stay connected to the outcome.

## Deliver Clear, Actionable Recommendations

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Even when a group is advisory, its final output needs to be more than a summary of discussion.

A strong final product should:

- Clearly state the group's conclusions or recommendations
- Identify who is responsible for acting on them
- Include a rationale that ties back to the group's charge and purpose
- Be accessible to both technical and non-technical audiences

When leaders receive vague, lengthy reports, it's easy to file them away and move on. When they get a crisp set of actionable ideas with clear support, they pay attention.

## Honor the Group and Its Work

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Closure isn't just functional—it's relational. People who joined your CDMP invested time, ideas, and political capital. Acknowledge that.

Consider ways to:

- Thank participants in a way that fits your agency's style and the group's tone
- Offer letters of appreciation or public recognition where appropriate
- Share a summary or short video that shows what the group achieved



This builds goodwill, keeps doors open for future engagement, and reinforces a culture of collaborative leadership.

## Plan for the Hand-Off

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If the CDMP is producing recommendations for another body to act on—such as a governor’s office, legislature, or state agency—set up that transition with care.

This might include:

- A briefing with decision-makers to walk through the recommendations
- Advance conversations to ensure alignment and support
- A plan for how progress will be tracked and communicated

Without a strong hand-off, even the best ideas can stall.

## Make the Process Visible

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Help others see what the group accomplished and how it worked. This builds public trust and reinforces the legitimacy of the recommendations.

Post-process communications might include:

- A public-facing report or executive summary
- A blog post, op-ed, or press release
- A short video recap or slideshow of the group’s work and impact

Don’t just let the group fade quietly. Make its work known.



## Takeaway

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Closing a CDMP well requires more than scheduling a final meeting. It takes intention, clarity, and care. The final steps of the process are often what people remember most.

If you want to be known for running processes that matter, end strong. Set the stage for action. Honor the people who participated. And make sure your CDMP leaves a legacy—not just a paper trail.



## The Confluence PSG Advantage

Confluence Policy & Strategy Group brings a rare blend of expertise in public policy, politics, and facilitation with a proven track record of helping government, nonprofit, and private sector leaders move complex and contentious issues forward. Our team has managed hundreds of collaborative processes across sectors and geographies—from facilitating cross-agency work groups and statewide coalitions to advising governors, agency heads, and corporate executives. Whether navigating regulatory reforms, designing strategic plans, or resolving conflict among diverse stakeholders, Confluence is trusted for its ability to cut through gridlock, build alignment, and drive results.

# Recent Confluence Projects & Team Experience

## Collaborative Decision Making Processes (CDMPs)

State Fiscal Policy  
 Artificial Intelligence Policies & Regulation  
 Transit Governance & Accountability  
 Transportation Funding  
 Criminal & Juvenile Justice  
 Forensic Science & Services  
 Housing Affordability & Inventory  
 Corporate Housing Ownership  
 Land Use & Planning  
 Economic Development  
 Workforce Development  
 Apprenticeships & Career Pathways  
 Post-Secondary & Higher Education  
 K-12 School & Educator Safety  
 K-12 Educator Preparation & Pathways  
 Early Childhood Education Workforce  
 Rights of People with Disabilities  
 Anti-Discrimination Policies  
 Wildfire Code Development

## Conflict Navigation

State & Local Governments & Agencies  
 State Boards & Commissions  
 School Boards, Systems & Communities  
 Local & National Businesses

## Negotiations

Intergovernmental Agreements  
 Public-Private Partnerships  
 Collective Bargaining Agreements

## Strategic Planning

State Government Agencies  
 State Boards & Commissions  
 Town, City & County Governments  
 Non-Profit Organizations  
 Philanthropic Foundations  
 Professional Associations  
 Private Sector Businesses  
 Corporate Executive Transitions  
 Mayoral & Gubernatorial Transitions

## Organizational Assessments

Office & Division Culture  
 Staff Satisfaction  
 Performance Management  
 Professional Development Opportunities  
 Career Pathways  
 Succession Readiness

## Stakeholder Engagement

Economic Development  
 Healthcare  
 Workforce Development  
 Criminal & Juvenile Justice Reform  
 Urban Development & Planning  
 Transit System Expansion  
 Transit Oriented Development  
 Higher Education System Design  
 K-12 Education System Design  
 State Grant Program Design  
 State Priorities & Use of Federal Funds

# About The Authors



**Berrick Abramson**

President, Confluence  
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Berrick Abramson is a nationally respected strategist and executive facilitator with more than 25 years of experience in public policy, government affairs, and private sector finance. As President of Confluence PSG, Berrick oversees all aspects of the firm's work, frequently leading high-stakes engagements that demand skilled facilitation, political savvy, and deep policy knowledge. Known for his ability to break through gridlock, he has advised governors, mayors, state legislators, members of Congress and C-suite leaders across the country. His expertise spans fiscal policy, economic development, land use, public safety, housing, workforce development, K-12 and post-secondary education, transportation, civil rights, and criminal justice. Earlier in his career, Berrick worked in corporate finance and later led national public policy teams and practices for several organizations. Beyond his professional work, Berrick is an adventure race competitor, skydiver, a mentor to startup founders, and an advocate for Crohn's disease awareness and research.

Caroline Steele brings more than 15 years of experience in government, nonprofit leadership, and corporate finance to her role as Policy Director and Senior Project Manager at Confluence PSG. Caroline leads the firm's day-to-day operations and manages complex, multi-stakeholder projects ranging from high-profile state government coalitions to cross-sector collaborations. Known for her precision, professionalism, and ability to manage competing priorities, Caroline has built strong, trusted relationships with leaders in government, business, and philanthropy. Her background includes organizing international events, navigating multimillion-dollar M&A transactions, and designing stakeholder engagement strategies. Caroline is also a passionate advocate for animal welfare, a devoted family member, and an avid explorer of the outdoors.



**Caroline Steele**

Policy Director & Senior Project  
Manager, Confluence Policy &  
Strategy Group



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