

# Building Collaboration From the Inside Out

By Lori Bartczak

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# Introduction

## Creating an Internal Environment That Enables Collaboration

The call for greater collaboration has been a persistent drumbeat in the nonprofit and philanthropic sectors in recent years. The message is clear: The scale and complexity of the problems that the sectors seek to address require collaborative approaches. A go-it-alone mentality will not result in meaningful impact.

GEO's most recent survey of philanthropic practice found that 80 percent of respondents said they believe it is important to coordinate resources and actions with other funders working on the same issue.<sup>1</sup> Many grantmakers are already collaborating in ways both large and small and through a variety of formats, and many had been doing so before *collaboration* became the latest philanthropic buzzword.

And yet, because collaboration is hard and messy, many grantmakers and nonprofits are uncertain about the best way to move forward. Some may still feel the sting of previous attempts at collaboration that did not bear fruit and are uncertain about how to avoid repeating past stumbles. Others may struggle to prioritize the network weaving and relationship building that are critical components of collaboration in the

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<sup>1</sup> Grantmakers for Effective Organizations, *Is Grantmaking Getting Smarter?* (Washington, DC: GEO, 2014).

Available at <http://www.geofunders.org/resource-library/all/record/a066000000H6creAAB>. The survey reached 637 U.S.-based, staffed grantmaking organizations.

press of day to day demands. Some may seek to understand the impact of a collaborative effort. Others may find that their institutional structures and systems, unintentionally run counter to what being a collaborative partner requires.

Tonya Allen, president and CEO of The Skillman Foundation, put it well: “Collaboration is a muscle that needs to be trained and used well. How do we create an environment for us to use that muscle?” Grantmakers and nonprofits that want to be more collaborative need to ensure that their organizations offer an enabling environment for doing so — in other words, they need to take steps to ensure that their organizations are “collaboration ready.”

“Collaboration is a muscle that needs to be trained and used well. How do we create an environment for us to use that muscle?”

— Tonya Allen,  
The Skillman Foundation

Looking inward and ensuring that an organization has the right elements in place to be a good partner and collaborator is necessary even though the tactics of how to collaborate vary depending on who an organization may work with or on the size, type and formality of the effort. To partner with anyone for anything, an organization needs effective internal culture, practices and priorities that can open and orient its board, staff and volunteers toward being better collaborators.

## About this publication

This publication is focused on building an organization’s collaboration muscles. It offers guidance on steps grantmakers and nonprofits can take to adopt a “collaborative mindset” (see page 4) and align values and practice so they can be better partners in collaboration. It is based on research and interviews with grantmakers, nonprofit leaders, technical assistance providers and thought leaders from 2013 through 2015.

The first chapter of this publication describes ways grantmakers *condition themselves for collaboration*, which requires considering what they want to accomplish through collaboration and how current values, culture and organizational priorities align with that vision. The second chapter focuses

on *key changes grantmakers may need to make* inside their organizations in order to be effective collaborators. These changes may include shifting processes or priorities, developing new skills, and reallocating resources. In addition to these two primary chapters, this publication spotlights the stories of grantmakers that have made intentional shifts to create a more enabling environment for collaboration.

This publication is not intended to provide guidance on structuring effective collaboration or on how grantmakers can build capacity for grantee collaboration, though the stories here are relevant to grantmakers and nonprofits alike. For a list of resources on collaboration in philanthropy, see Appendix B, page 46.

To partner with anyone for anything, an organization needs effective internal culture, practices and priorities that can open and orient its board, staff and volunteers toward being better collaborators.

## What do we mean by collaboration?

We define *collaboration* as groups of funders, nonprofits or other stakeholders aligning around a shared vision and targeting resources and activities in support of that vision. Collaboration can come in many different forms, including networks, coalitions, movements, strategic alliances, strategic co-funding, public-private partnerships and collective impact initiatives. For a more detailed description of various collaboration types, see Appendix A, page 44.

Collaboration may not always be the best strategy, however. Therefore, funders and nonprofits must discern how well collaborative efforts will help further their missions. That said, this type of work has the potential to pool knowledge and resources of many actors toward a common goal, thus enabling faster and greater impact. Although the

following is not an exhaustive list, collaborating with others may make sense when:

- addressing an issue from multiple angles or strategies could help push change forward,
- interventions have not been coordinated enough to make a lasting difference,
- an issue or problem needs more resources or additional funding sources, or
- the context or environment suddenly requires a more united or aligned response.

“Promoting internal collaboration is a change management process.”

— Chris Cardona,  
Ford Foundation

Collaborative initiatives can involve funders, nonprofits, private sector actors, government agencies and everything in between, in endless configurations. The most important factor in determining who comes to the table is their stake in the work and whether they can make a meaningful contribution toward the goal.

The tricky part is that collaborative efforts are messy and complex. Collaboration takes significant time and resources — we may invest quite a bit for a long time without seeing significant progress. This timeframe can be hard to endure when we know the issues being addressed are so urgent.

Funders and nonprofits that are used to typical programs and funding strategies run the risk of being underprepared for new ways of thinking and working that can ultimately maximize their results. Boards, staff and volunteers need to become ready for longer-term, complex engagements involving new tradeoffs that require different skills, different ways of working and a different mindset.

## The collaboration mindset

What does an internal environment that enables collaboration look like? In *Cracking the Network Code*, GEO, along with Jane Wei Skillern, Nora Silver and Eric Heitz, described four principles of the “network mindset.” This could just as well be called the “collaboration mindset,” as the principles

are relevant for grantmakers and nonprofits alike no matter what form the collaboration might take. Organizations that are “collaboration ready” hold these four principles as values:

- **Focus on mission, not organization.**  
Collaboration requires prioritizing the shared goal or mission above any other single organization’s considerations.
- **Exercise trust, not control.**  
For true collaboration to happen, trust and shared values are far more important than formal control mechanisms, such as contracts or accountability systems.
- **Lead with humility, not brand.**  
Grantmakers are often accustomed to being the strongest presence in the room or at the table. Using a collaborative mindset, however, organizations work alongside their peers as equals and willingly take a backseat when others are in a better position to lead.
- **Think like a node, not a hub.**  
Those who embrace the collaborative mindset see their organizations as one part of a larger web of activity directed toward a cause, not as the hub of the action.

In addition to embracing the collaborative mindset, organizations need to have the right systems and processes in place to enable staff to use the muscles of collaboration. Structures that are already in place inside many organizations may

actually impede collaboration rather than foster it. For example, program staff cannot prioritize the relationship building that is necessary to serve as a “node” in the network if their plates are too full. Strict adherence to programmatic silos may lead to missed opportunities or constrain support for social issues that nonprofits are working to address more holistically. Grantmakers’ preference for one-year grants, quarterly board meetings, and clearly delineated or narrow strategies can come into conflict with the long-term, emergent nature of collaborative efforts.

As Chris Cardona, program officer at the Ford Foundation and formerly at TCC Group, described, values and practice aren’t always aligned. “Promoting internal collaboration is a change management process,” Cardona pointed out. “It’s interesting sometimes to see a disconnect between what you say you believe in and what you actually do. You might see within a foundation a lot of stated preferences about putting grantees first, but the way their grant applications and reporting procedures are put together — without consideration for right sizing — may suggest the foundation values compliance over learning.” Grantmakers that put the collaborative mindset into practice spend time reflecting on how their practices match up with espoused values.

Effective collaboration requires an inside-out approach. By creating an enabling environment and adapting practices and processes to support collaboration, an organization can ensure it is ready to realize the potential of its collaborative efforts.

# Chapter One: Conditioning for Collaboration

Because effective collaboration requires the right enabling environment, a critical first step is for organizations to do some self-reflection, preparation and, in some cases, shifting of cultural dynamics. Conditioning for collaboration includes three areas:

- 1 Linking collaboration to your organization's goals
- 2 Determining how you fit into the landscape
- 3 Laying the groundwork through relationship building



## SECTION 1

# Linking collaboration to your organization's goals

- + Organizations that have success with collaboration are explicit about what they want to achieve and how collaborative efforts can help advance those goals.

With all the current buzz around collaboration, it may be tempting to jump in simply because a colleague asks or because there's an exciting initiative happening in the community. However, organizations that have had success have found it is important to be explicit about what they want to achieve and how collaboration advances those goals before actually starting the work. For many, it comes down to setting an ambitious agenda for change, realizing that the vision can't be accomplished without collaboration and then prioritizing collaboration with partners that have similar aims.

In 2012, the Deaconess Foundation announced a new strategic direction to advance its vision of a St. Louis metropolitan region that values the health and well-being of all children and gives priority attention to the most vulnerable. In this new strategy, the foundation decided to prioritize grantmaking to support the capacity of nonprofits in the community to undertake collective action, and it renewed its commitment to partnering with others working in pursuit of a common vision.

"We made a purposeful shift to more collaboration out of recognition that our resources alone are insufficient to tackle the issues we want to address," said Cheryl Walker, board chair of the Deaconess Foundation. "For us, collaboration is about joining with others to try to move the needle, whether on issues such as improving the social, emotional and

physical well-being of our youth or ensuring that more kids graduate and go to college. We are quite purposeful about the vision of our collaborations."

The Greater Houston Community Foundation governing board adopted a strategic vision for the foundation of developing platforms for high engagement philanthropy — with donors, with community leaders, and with other initiatives at the national and local levels. This new vision gave staff the space to explore models for how to collaborate in order to have more impact. "Board support for the collaborative work has been critical to its success in every way," said Renee Wizing-Barrios, senior vice president and chief philanthropy officer at the foundation.

Leaders of Massachusetts-based The Hyams Foundation, Inc., came to a similar conclusion as they considered how best to advance a vision that Boston and Chelsea be cities where all residents can afford to live, have opportunities to advance, and are able to contribute to civic life and community well-being. "Funder collaboration has been part of our DNA and the way we operate for a long time," said Beth Smith, executive director. "Once we and the other funders we work with decided we wanted to help bring about greater change, we all realized we need to do that together, particularly given the scope of the issues and the size of the resources we each bring to bear."

In addition to being clear about how collaboration in general supports organizational goals, grantmakers and nonprofits must also give careful consideration to the goals of each potential collaborative effort and consider how well they align with what the organization wants to accomplish. It is unlikely that the vision of a collaboration is going to mirror an organization's goals exactly; therefore, organizations need to think about where compromise might be required and whether they are willing to do so.

“What does your institution want — and to some extent need — to get out of the collaborative effort?” asked Paul Di Donato, director of the Civil Marriage Collaborative. “If the goals and objectives of the collaborative seem to be at odds with your individual or organizational wants and needs, then it may not be the right fit.” For example, if the collaborative effort is only loosely aligned with your organizational goals but you want to exercise a high level of influence over how funding is directed to help it match more tightly with your goals, then that collaborative effort is probably not right for you.

## SECTION 2

## Determining how you fit into the landscape

- + Important precursors to collaboration include assessing the landscape, understanding the needs and motivations of different players, and identifying possible paths forward and roles for the organization.

### Understanding the issues and players

Once an organization has clarity on the goals of a collaboration and how it aligns with organizational vision, the next step in conditioning for collaboration is getting a clearer view of the issue area or field

(which may take considerable time). It can be difficult to assess whether there is enough momentum around an issue and whether the time is ripe for a collaborative effort. An important precursor to collaboration is gathering the knowledge needed to assess the landscape, learn from related efforts and identify possible paths forward.

Before the Greater Houston Community Foundation decided to engage in collaborative efforts on education and homelessness, staff spent almost a year learning about the subject matter, scanning the landscape, getting an understanding of the possible role they could play and laying the groundwork for each collaboration. GHCF used the time to convene interested donors, build trust with them, create shared goals and frameworks for collaboration, and establish fund governance and grantmaking philosophy. Simultaneously, staff members conducted a landscape analysis on the issues, which was informed and reinforced by the expertise and experience the foundation's donors brought to the table. The landscape analysis was as much about understanding the data and the issue as it was about looking at what other funders were doing in the community — all in order to determine where the foundation could play a meaningful role to move the issue forward.

## Defining your role and being flexible about it

For each collaboration, grantmakers and nonprofits need to ask themselves: What role do we want to play? Where can we add value? Grantmakers are often uniquely positioned to play roles such as knowledge gatherer, convener, network weaver, fundraiser or spokesperson, given their resources, connections, bird's-eye view of the landscape in their community or issue area, and platform. For many, roles can vary over time and from effort to effort.

“At GHCF we are leading collaborations that leverage the interest and passion of our donors and other partners in the philanthropic community. We are careful not to be duplicative of other efforts in the community. We also participate in collaboratives led by other foundations where we have common interests,” Wizig-Barrios said. (For more on the Greater Houston Community Foundation, see page 29)

“One of my colleagues has always used the phrase, ‘Do what we do best and partner for the rest.’ Ideally we’re looking for a partner who can do something better than we can...”

— Dr. Raymond J. Baxter,  
*Kaiser Permanente*

Kaiser Permanente used a similar approach when thinking about its role in the Convergence Partnership, an alliance of funders working toward a common vision of healthy people and healthy places across the United States. “One of my colleagues has always used the phrase, ‘Do what we do best and partner for the rest,’” said Dr. Raymond J. Baxter, senior vice president of community benefit, research and health policy. “There’s no point partnering

with somebody who can already do what you can do. Ideally we're looking for a partner who can do something better than we can, reach people we can't reach, be present in areas we can't or help us create change we couldn't on our own."

Another critical factor is being able to be flexible about your role. In the Convergence Partnership, partners have, at different times, identified specific issues for which they want to make a statement and raise awareness — for example, the renewal of the farm bill. "It's not always the case that every one of our organizations feels comfortable getting out in front and putting our name on something like a legislative position," Baxter said. "We have an understanding that if one party needs to drop back for a number of reasons, the rest can proceed without that party. It doesn't jeopardize our working relationship; it's just understood. Sometimes you can't get out front; other times you can." This flexibility around roles has been a factor for success in the partnership.

An important factor in considering the gap a grantmaker might fill in a collaboration is understanding the goals and motivations of others involved.

In addition to playing different roles at different times within a partnership, a grantmaker's role may vary from collaboration to collaboration. The Deaconess Foundation plays a variety of roles in a number of collaborative efforts, ranging from a quiet funding partner to a vocal leader and convener. "There can be an effort that ties in greatly to the mission of supporting and serving our children but for which the foundation has no direct expertise. In that case, simply providing financial support can be critical. An organization may be able to leverage our contribution for additional support, or we may be able to fund costs others aren't supporting," Walker said. "Other times we might be uniquely positioned to have a leadership role, and it makes sense for us to convene."

## Learning about potential partners' interests

An important factor in considering the gap a grantmaker might fill in a collaboration is understanding the goals and motivations of others involved. Just as with any relationship, compromise will be required, so it's always helpful to understand others' perspectives.

"Collaboration requires a lot of give and take," Wizig-Barrios said. "It's important to understand not only the values people share in common but also what each player is hoping to get out of the collaboration. Then we look at what our role is going to be and how it fits in with others and whether we indeed have the capacity to play this role well." From the experience of the Convergence Partnership, Baxter agrees that understanding partners' motivations is critical. "If people understand each other's interests, you can get past a lot of things that could end up derailing the partnership or slowing you down from work," Baxter said.

## SECTION 3

# Laying the groundwork through relationship building

- + Successful collaborators invest in relationships and build trust with partners, and they proactively work to ensure the equity and buy-in necessary to bring stakeholders along.

## Fostering trust

In preparing for collaboration, it's important for an organization to foster a culture that values trust — among grantmaker staff and trustees, with grantees and with other partners — as well as a willingness to be flexible and sometimes give up control. This can feel uncomfortable for those who are used to operating in a more top-down environment with a focus on accountability for results and a desire for brand recognition.

Relationships are the currency of trust. For trust to develop, grantmakers must prioritize building strong relationships not only within their organization but also with grantees and other partners. It's important to remember that trust takes a long time to build and can be easily broken if sensitive situations aren't handled well.

Melanie R. Bridgeforth, executive director of statewide child advocacy organization Voices for Alabama's Children, described what trusting relationships with her funders look like. "Being involved in our work beyond financial support

helps break down barriers," she said. "When a donor attends our coalition meeting, opens doors for us to engage potential stakeholders or simply calls to check in, it means a lot. It helps us build strong and meaningful partnerships. Because we have a trusting relationship, it's far easier for me to lay out what I need to do in order for our organization and work to be successful. Perhaps, it's explaining to them when we need a strategy change or budget amendment and they grant us the flexibility to do what is needed because they want to see us succeed and because the trust is there."

Another signal of trust is willingness to cede control. "A willingness to compromise in a genuine and comprehensive fashion is essential — but not always a strong suit with foundations," said Di Donato. "If you can't compromise around strategies, goals and decision-making processes, then the collaborative is not going to be an engaging or particularly enjoyable, fun or successful experience for you, and your participation is very unlikely to contribute to the collaborative's success."

“Nothing says ‘I don’t trust you’ like a stack of rigorous forms a grantee must complete.”

— A nonprofit leader

Sometimes grantmaker practices and procedures inadvertently stand in the way of developing trusting relationships. For example, as one nonprofit leader quipped, “Nothing says ‘I don’t trust you’ like a stack of rigorous forms a grantee must complete.” For some grantmakers, making adjustments to foster increased trust may mean loosening restrictions on grant requirements, allowing for longer timeframes for progress and accepting measures of progress identified by the collaborative rather than by funder-driven metrics.

## Leaning in and being present

Successful collaborators invest in relationships with other partners and with those inside their organization to continually bring stakeholders along and ensure buy-in. Ana Lisa Yoder, director of grantmaking and special projects at The Philadelphia Foundation, found it critical to dedicate time for one-on-one interactions in order to build relationships. “While important dialogue goes on in the group setting, the one-on-one conversations can be equally valuable,” Yoder said. “I’ve learned to reach out individually to solicit feedback and to do so regularly. It communicates that we need everyone’s voice and can inform the group process.”

When The Colorado Trust embraced a new strategic direction of advancing health equity across the state, the trust wanted to engage communities in determining funding priorities. This required reorganizing the staff. Instead of maintaining the former model of having program officers based in the Denver office, the foundation hired five new positions, titled “community partners.” Their charge is to partner with a representative group of residents in communities across the state to set priorities for advancing health equity in their communities and places. The community partners started in early 2015 and are presently working in 15 communities and places across Colorado.

“We expect to go into many different places in Colorado and have many different problems and solutions being worked on and addressed and tried — and we’re not controlling that,” said Gwyn Barley, director of community partnerships and grants. “The residents will build their road map for achieving health equity. That road map will include problem identification and prioritization, approaches for solving those problems, and evaluation to inform and allow the community to evolve their strategy as needed. They will also determine what funds they need to implement their plans and additional partners needed for funding and collaboration. We’re going to give the community the grant dollars needed to engage the partners — including nonprofit organizations — that they need to do this work.” While this approach may not work for all foundations, any grantmaker can think about how engaging grantees differently might yield better results; similarly, nonprofits can think about how improving the way they engage beneficiaries could affect their work.

## Proactively addressing power dynamics

To some, the notion that grantmakers and grantees can ever be equal partners is a fallacy because one party holds the money and decision-making authority on how those resources are spent. Grantmakers who want to have an equal voice at a table with grantees may need to take intentional steps to help mitigate these dynamics. While mitigating power imbalances requires time, patience and flexibility, the upfront investment and attentiveness can set the stage for a smoother partnership down the road.

When the Missouri Foundation for Health engaged three grantee organizations to partner with it in co-creating a collective impact initiative aimed at reducing infant mortality in the state, efforts at co-creation initially hit some roadblocks. In the beginning, grantees tended to look to program director Kathleen Holmes for guidance and direction, and she had to be intentional about stepping back and helping to lift insights from the group.

“Our CEO [Robert Hughes] has helped me think through how to set an environment where it wasn’t the foundation coming in and saying what needed to happen, but setting an environment for people to be able to express their needs and concerns,” Holmes said. (For more on how the Missouri Foundation for Health did this, see page 41.)

## Becoming culturally fluent

Cultural competence is another important consideration when it comes to relationship building. Many of the grantmakers interviewed for this publication said they were increasingly spending time out of the office, often in neighborhoods that are quite different from where they live or grew up, thus, learning how to effectively build relationships with diverse stakeholders was critical. As an example of one possible approach, Tonya Allen credits training in Results-Based Leadership<sup>2</sup> for helping Skillman staff build their listening and facilitation skills to help ensure that they were able to build the relationships necessary for the authentic engagement the foundation wanted with its target neighborhoods.<sup>3</sup>

Not all organizations can dedicate large amounts of time to relationship building, and there are clear tradeoffs for taking a more involved approach. The key is to be strategic in figuring out how many relationships an organization can maintain in a meaningful way and how close it needs to be to what’s happening on the ground in order to maximize resources and reach goals.

<sup>2</sup> For more information, see Annie E. Casey Foundation, “The 5-2-2 of Results-Based Leadership Development,” posted March 5, 2014, <http://www.aecf.org/blog/whats-the-5-2-2-of-results-based-leadership-development/>.

<sup>3</sup> For additional resources on cultural competence, see “Philanthropic Initiative for Racial Equity,” available at <http://www.racialequity.org/>; “The D5 Coalition,” available at <http://www.d5coalition.org/>; and International Human Rights Funders Group and IDEX, “Cultural Competency in Human Rights Grantmaking: What’s Power Got to Do with It? Examining Our Effectiveness in Working Across Cultures,” available at <https://www.ihrg.org/resource-archive/entry/cultural-competency-human-rights-grantmaking-whats-power-got-to-it-examining->.

# Making Changes to Be Able to Flex Collaborative Muscles

Once grantmakers have taken a hard look at goals, roles and values and how well those are aligned with the collaborative mindset, they can take steps toward building a collaborative culture and consider changes in practice that might help foster better partnership. Interviewees for this publication described a range of changes, large and small, that help create better conditions for success in collaborations. These changes include the following:

- 1 Building a diverse and committed leadership
- 2 Focusing on communication
- 3 Providing the resources required
- 4 Ensuring that collaboration remains a priority



## SECTION 1

# Building a diverse and committed leadership

- + If a grantmaker is going to prioritize collaboration, leadership must be bought into the value of — or, even better, be directly involved in — the relationship building and network weaving that collaboration requires.

## Engaging a diverse board

When The Colorado Trust embarked on its new strategic direction, Ned Calonge, president and CEO, had to make the case to the board. It turned out not to be too difficult. “The board recognized that the problems we’ve been working on for decades are still here,” said Gwyn Barley, director of community partnerships and grants at the trust. “To keep doing the same thing didn’t make sense. They saw that we needed to try something radically different.” For them, “radically different” meant engaging residents where they live to set priorities for the foundation over time.

Barley also credits Calonge’s efforts to diversify the board in helping foster collaboration. “He was being intentional about bringing on expertise from people we hadn’t had on the board before — in particular, people of color. Having a more diverse range of perspectives on the board has helped change the conversation and offered opportunities to look at issues from different angles,” Barley said.

In her experience as board chair of the Deaconess Foundation, Cheryl Walker has also found that having a diverse board has been instrumental in driving a collaborative spirit. Deaconess looks

at diversity in terms of professional background, geographic representation, age, race and gender. Bringing a range of perspectives to the conversation, Walker said, helps the board have a clearer sense of stakeholders to engage, partners to reach out to and potential challenges in their work in the community.

Another factor in helping build the collaborative spirit among the board, Walker said, has been setting aside time and space for relationship building across the board, primarily through regular board retreats. Deaconess Foundation’s annual board retreats take place over two days. Included in the agenda are time for networking and socializing, usually over meals, as well as exposure to outside speakers on issues relevant to the foundation’s work. In early 2015, as the foundation was still grappling with how best to advance its vision in the wake of the killing of Michael Brown by a Ferguson police officer and the resulting uprisings, president and CEO Starsky Wilson put together a panel comprising a pastor, a community activist, a university professor and a local professional to talk about the issue from a range of perspectives. “The opportunity to interact with the panelists and each other and to be able to have different opinions on emotional topics was powerful,” Walker said.

Walker continued, “Creating an environment where people feel comfortable expressing their thoughts and ideas helps us be better trustees in the long run, because we left with a deeper level of familiarity with, and better appreciation for, one another and our varied perspectives than we would if we had just sat in the meeting and reviewed reports for an hour and a half. We left the retreat better equipped to serve the mission of the Deaconess Foundation and the St. Louis community as a whole.”

At the Jim Joseph Foundation, the value of collaboration starts at the board level as well. “Board members have partnered with the foundation’s executive leadership to develop a results-oriented, highly relational approach to its philanthropy that features collaboration as an integral part of doing business,” said Josh Miller, senior program officer.

Not only do Jim Joseph Foundation board members talk the talk, they also walk the walk. Board members are intentional about meeting with trustees of other foundations supporting Jewish learning. The board president, Al Levitt, has built relationships with other board presidents, and the entire board of directors has met with the board of The AVI CHAI Foundation in New York to talk about their shared vision and organizational priorities. This relationship building across foundations occurs at the staff level as well. Staff of the Jim Joseph Foundation meet with staff of the Charles and Lynn Schusterman Family Foundation and AVI CHAI on a regular basis, both in person and via videoconference, to talk about how they can coordinate efforts to have an impact on their shared vision of advancing the field of Jewish education, as well as opportunities to streamline the process for their common grantees.

## Modeling the collaborative spirit

Of course, senior leaders also play a critical role in modeling the type of collaborative partner the foundation seeks to be. “The incentives, policies and organizations that are in place are not designed to promote collaboration within the messy, complex systems that shape our communities,” said Chris Thompson of Fund for Our Economic Future. “To overcome those limitations, galvanizing leadership is necessary to unite the diverse stakeholders and organizations that make up those systems. Without galvanizing leadership, this does not work.”

Walker of the Deaconess Foundation credits CEO Starsky Wilson for being an inspiring leader who is especially astute at being able to bridge divides. As she reflects on the qualities that make Wilson a collaborative leader, she traces many of them to his formal training as a minister — being an active, nonjudgmental listener; having strong communications skills; being thoughtful; and having an earnest respect for the contributions of others.

“A key trait for collaborative leaders is that they have to be open,” Walker said. “You can’t come to the table saying, ‘I’ve been doing this for X number of years, I’ve done all the research, I know how to do this. We’re going to collaborate, but really collaboration means do it the way I suggest.’ That may sound extreme, but so many times people come to the table with a version of that sentiment. A key trait is to listen to what those around you have to say and stay unattached to whatever outcome you had in mind from the beginning. This doesn’t mean you have to agree to everything. As they say in the black church, ‘It’s OK to disagree; just don’t be disagreeable.’”

In the fall of 2014, Missouri Governor Jay Nixon tapped Wilson to co-chair the Ferguson Commission, a cross-sector group convened to assess the underlying social and economic conditions that are present in Ferguson and the broader St. Louis community. To Walker and the rest of the Deaconess board, this appointment was a sign that the foundation was succeeding in its efforts to position itself as a collaborative partner and leader regarding issues related to the well-being of children in St. Louis.

Foundation leaders and boards also play an important role in setting the tone for collaboration for the rest of the staff and in supporting staff efforts in collaboration. “A key responsibility for me is mentoring, developing and training staff,” said Pete Tulipana, CEO of the Iowa West Foundation. “I provide regular opportunities for staff to meet with me and talk through their thinking, and I offer guidance on working with the community.” (For more on the Iowa West Foundation, see page 38.)

Leadership buy-in for collaboration can be visible outside the organization as well as inside. “If collaborating is not a vision of the CEO and board, you can feel it,” said Elise Cutini, executive director of Silicon Valley Children’s Fund, of her funders. “It has an impact on the work and the people doing the work. One funder’s leadership signaled support for working together through the amount of time their program officer spent supporting our collaborative. That person worked tirelessly behind the scenes to prepare high-caliber

“The incentives, policies and organizations that are in place are not designed to promote collaboration within the messy, complex systems that shape our communities. To overcome those limitations, galvanizing leadership is necessary to unite the diverse stakeholders and organizations that make up those systems.”

— Chris Thompson,  
*Fund for Our Economic Future*

engagements for the group, including speaker selection and collaborative agenda development. Because of this person’s engagement, flexibility and time investment, we knew that the funder and its leadership was committed to our success.”

Collaborative efforts are time consuming and may not yield immediate or measurable results; it may require an adjustment for the organization to get comfortable with giving time and space to this type of work. Although there are cases in which grantmaking staff are able to participate effectively in collaborative efforts without a high level of commitment from leadership, buy-in from senior leadership and the board is a critical factor for making collaboration an organizationwide priority.

## SECTION 2

## Focusing on communication

- + Frequent communication — internally and externally — is critical to ensuring that all partners and stakeholders are aligned on the vision of the collaboration and what’s happening.

Frequent and clear communication is critical to making sure all partners and stakeholders have a shared understanding of what is happening and of future direction. “I think, a lot of the time, these things break down because there isn’t sufficient communication; when you haven’t heard anything in a while, you start to wonder what’s going on,” said Dr. Raymond J. Baxter of Kaiser Permanente. “Regular communication about what’s going on in the actual partnership work is important. It’s time

consuming and laborious, but boy can you tell the difference when it’s not happening.” One way to help build relationships is to set aside time for people to get to know one another personally, such as at the grantee gatherings hosted by the Gordon and Betty Moore Foundation (see page 35).

Some grantmakers with experience in collaboration have also found it helpful to build in intentional practices to ensure that communications about collaborative efforts get the time and space they need. For example, The Skillman Foundation has put a meeting structure in place to ensure that staff are up to date on the various collaborations the foundation is part of and are able to connect the dots across initiatives. “Our executive team meets weekly, but we also do 15-minute check-ins two to three times a week, because there are so many moving parts,” Tonya Allen said. “It’s a good way to keep people up to date and make sure they are connecting on the things they need to know. The pace of the work moves so fast, and when you’re most busy, you’re unlikely to communicate. It’s our way of creating a structure for the constant communication that is necessary in collaborative work.”

“Regular communication about what’s going on in the actual partnership work is important. It’s time consuming and laborious, but boy can you tell the difference when it’s not happening.”

— DR. RAYMOND J. BAXTER,  
*Kaiser Permanente*

## SECTION 3

# Providing the resources required

- + Collaboration requires resources — both time and money. Leadership can set the spark for collaboration by saying that it's a priority, but leadership must also fuel the fire by providing the time and money for the organization to be an effective partner.

## Increasing staffing and administrative expenses

For some grantmakers, carving out more time for staff to focus on collaboration has required an increase or change in staffing. Required resources include ample time for staff to spend in relationship building, field scanning or planning for collaboration. It also includes money to cover the costs of collaboration, including expenses associated with convening, administration or backbone leaders, and assessment.

The Skillman Foundation has a staff of 30 and \$480 million in assets. “When you compare The Skillman Foundation to other foundations our size, we’re always staffed a little on the high side,” Allen said. “The reason we purposely do that is because we want our staff to have the bandwidth to be able to convene, provide leadership or be a member of a coalition.”

The Hyams Foundation allocates staff and administrative resources with the same mindset. Hyams has a staff of seven and \$143 million in assets.

“Our board is committed to paying for staff time and capacity to play a role in collaboration,” Beth Smith said. “If you were to look at our administrative expenses against a lot of other foundations, we would seem high; but if you compare us to foundations that are convening grantees and other funders and undertaking capacity-building research to support collaboration, we are very much in the ballpark.” For leadership at Hyams, this investment in additional staff time is worth it, because collaboration is what allows the foundation to have greater impact.

When Sand Hill Foundation initiated an out-of-school-time funders’ collaborative, the foundation had only one part-time staff member — executive director Ash McNeely. Once the funders’ collaborative reached the point at which it needed one person to take on more of a leadership and backbone role, McNeely agreed to do so. As a result of her increased involvement in this and another collaborative, McNeely doubled her time devoted to the foundation. Since then, the foundation has added two more staff positions — a program officer and a program associate — which allows McNeely to focus on the collaborative work.

## Nonprofits need resources for collaboration, too.

In addition to adding money to foundation budgets to cover the costs associated with collaboration, grantmakers can also structure grants that help cover grantees' expenses associated with collaboration. Meaghan Calcari Campbell, program officer of marine conservation at the Gordon and Betty Moore Foundation, finds the foundation's practice of providing multiyear grants a helpful tool for supporting collaboration. "If we're going to require collaboration, we have to be ready to financially support it," she said. "The ability to give multiyear grants has been helpful in supporting collaborations that often need the longer timeframe to germinate."

Caroline Novak, president of A+ Education Partnership (a nonprofit working on education reform in Alabama), says this type of investment can help fill capacity gaps in collaborative efforts. "In some collaborative efforts, funders have made the commitment to not only provide staffing that would stay in regular contact with us, but also provide resources for the development of communications and other key capacities we needed to do the work," she said. "We have had successful relationships because part of the funder role was to make sure they were providing what we needed on the ground to carry out the work."

### Reflection questions for grantmakers:

*Does your organization support collaboration through covering convening costs or administrative costs, unrestricted support, multiyear support, or other ways?*

*Does the foundation have resources to dedicate to collaboration?*

*What more might you need to do to help your grantees achieve their collaboration goals? Consider nonmonetary resources as well.*

Another refinement for Sand Hill Foundation, in addition to increased staff capacity, has been building more administrative expenses into the foundation's budget to help cover the costs of collaboration. "Our involvement in collaborative efforts continues to refine how we operate," McNeely said. "There's lots of administration associated with collaboratives that requires allocated time and resources," she added. "It's important to have flexible resources built into your budget. You should have extra, unallocated money available, so you can take advantage of unexpected opportunities that bubble up from the group work."

The time in which a grantmaker makes resources available can help or hinder collaboration as well. For example, an annual or biannual grantmaking cycle can impede a grantmaker's ability to be nimble and respond to opportunities as they arise.

## Reconsidering staffing structures and responsibilities

For many of the grantmakers featured in this publication, creating an enabling environment for collaboration required rethinking staff structure and responsibilities. A mindset shift resulted in decreasing the amount of work related to the actual mechanics of grantmaking to give more time and space for staff to prioritize being out in the community.

"If you want to be a partner in the community, you can't start from a mindset of 'my job is to make grants,'" said Gwyn Barley of The Colorado Trust. "You have to start with relationship building and joining people on a journey." This way of operating not only helps foster stronger partnerships; having an ear to the ground can also help grantmakers have a better sense of what's happening in the community.

The Skillman Foundation has streamlined its internal processes to encourage program officers to spend more time in the communities the foundation's grantmaking serves. "Now program officers are doing less of the technical pieces of grantmaking, such as report writing, and spending more time on the strategic parts of the work," Allen said. "Our staff are expected to spend more time in the field to be responsive, be engaged and be nimble." As a result of this flexibility and nimbleness, The Skillman Foundation is now leading a 36-member coalition designed to develop education policy recommendations for the state legislature. This coalition sprang from a need staff identified while spending time in the community. "If you would have asked me a year ago if we were going to do this, I would have said no, but we have to be nimble enough to be able to respond when opportunity strikes," Allen said.

Of course, there are always tradeoffs when a grantmaker decides to have staff spend more time outside the office. For example, a program officer's portfolio size is an important factor when considering the extent to which staff can be collaborative. Program officers at the Jim Joseph Foundation manage, on average, 10 to 12 grants at a time. "That means the way I spend my time as a program officer is much more intensive and engaged with my grantees and peer funders than someone who has 100 or 200 grants in his or her portfolio," Miller said.

Because collaborations have many moving parts, participants in a collaboration need to have a certain level of latitude and support from their

"There's lots of administration associated with collaboratives that requires allocated time and resources. It's important to have flexible resources built into your budget. You should have extra, unallocated money available, so you can take advantage of unexpected opportunities that bubble up from the group work."

— Ash McNeely,  
Sand Hill Foundation

organizations so that they can operate as good partners. This means foundation and nonprofit staff need permission, authority and trust to represent the organization in the collaborative and to make decisions on the organization's behalf.

"It's fortunate when you can work with a leader who values collaboration and understands that it requires flexibility to be effective," said Ana Lisa Yoder, director of grantmaking and special projects at The Philadelphia Foundation. "The front-end effort involved in any collaboration takes time, and outcomes aren't always immediately clear. The staff involved must be able to trust that leadership won't scrutinize that time but rather will recognize it as integral to the work."



## SECTION 4

## Ensuring that collaboration remains a priority

- + The activities required for collaboration can sometimes get lost in the press of day-to-day demands, so many grantmakers use formal mechanisms to keep the work on track.

Because so much of what is required for collaboration — relationship building, networking and communications — can be hard to measure or might be the activities that move to the bottom of a to-do list in the press of day-to-day demands, many grantmakers have found it helpful to keep a focus on these activities through job descriptions, performance goals and professional development.

When The Colorado Trust decided on a new staffing structure to better support their new vision in support of health equity, the job description for their new community partner positions looked

“It’s useful to be clear about what the expectations are and to help people recognize where there are areas for growth.”

— **Renee Wizig-Barrios,**  
*The Greater Houston  
 Community Foundation*

quite different from the former program officer role. “When we wrote the new job description for the community partners, we drove home the resident-driven nature of this work,” said Gwyn Barley. “We stressed that we see ourselves in partnership and service to the places and people that will be doing this work, and we attracted people the likes of whom we’ve never seen at the foundation before. They all speak Spanish. They come from and all live in the communities we’re serving, across the state.”

For staff at Kaiser Permanente, collaboration is baked into annual performance goals. Recognizing that in most cases staff will have to work together to achieve organizational goals, many staff have shared goals with two or more colleagues at the organization. At team check-ins, staff members look at the goals and assess progress collectively.

“It’s not always easy, because when three people are responsible, if you’re not careful, it can turn out that nobody’s responsible,” said Dr. Raymond J. Baxter. “But it helps reinforce our need to continuously practice working in collaboration, because most of what we’re working on is too complicated for the expertise of one person.”



Members of the Greater Houston Community Foundation leadership team and an outside consultant worked together to decide which behavioral competencies were most important for the foundation. As they considered the skills and capacities that were most important for staff, capacities related to collaboration rose to the top. Since GHCF is engaged in collaborative work with donors in ways beyond strategic co-funding, a partnership mindset is critical to staff success.

GHCF has adopted a behavioral competency model for staff to help them articulate the behaviors they want to see among other staff and the culture they want to foster at the foundation. “We use the model not only to help us look for certain behaviors while hiring but also to be part of our review process,” Wizig-Barrios said. “It’s useful to be clear about what the expectations are and to help people recognize where there are areas for growth.” See below for the list of competencies that GHCF believes are important for collaboration.

## Competencies for collaboration

The Greater Houston Community Foundation identified the following set of behavioral competencies that they find critical for collaboration among foundation staff:

- + Accepting responsibility.** Holds self accountable for delivering work in a timely, accurate manner; admits to and takes responsibility for mistakes.
- + Adapting to change.** Accepts change as a normal part of doing business, maintaining a positive attitude and exhibiting constructive work behaviors during periods of transition.
- + Championing customer needs.** Provides timely and professional service to both internal and external customers (including donors, private foundations and corporations engaged in philanthropy); is responsive to customer needs and requests; is always courteous to the customer; considers the needs of the customer when making decisions.
- + Communicating and interacting effectively with people.** Conveys ideas clearly and succinctly; gauges audiences effectively, tailoring the message appropriately to each audience; is comfortable interacting with people at all levels of the organization.
- + Displaying creativity.** Displays and encourages creativity and innovation to drive progress; is comfortable taking reasonable risks.
- + Establishing relationships.** Is comfortable starting conversations; makes good first impression and relates well to all kinds of people; is able to shift style and tone to fit the audience.
- + Inspiring and motivating others.** Encourages others to pursue and achieve their goals; helps others recognize opportunities to contribute to something bigger than themselves.
- + Making accurate judgments and decisions.** Takes a reasoned, logical approach in making judgments and decisions; carefully reviews available facts and information before reaching any conclusion.
- + Solving complex problems.** Methodically breaks down complex problems into manageable components in order to define and formulate a clear solution.

# Conclusion

Most funders and nonprofits value collaboration, and many are looking for ways to improve the quality of their collaborations with others. If, as Tonya Allen put it, collaboration is a muscle that needs to be trained and used well, everyone must look inside their own organizations and consider to what extent there is an enabling environment for collaboration. Do internal values, culture and priorities support collaboration? What changes to practices and priorities might be needed in order to be more collaborative?

**This section recaps key points in the publication and offers action steps grantmakers and nonprofits can take. Sometimes the scope and magnitude of the steps will vary depending on an organization's size, goals and resources.**

## CHAPTER 1

# Conditioning for Collaboration

## SECTION 1

**Linking collaboration to your organization's goals.** Grantmakers and nonprofits must be clear on organizational goals and how collaboration (in general and for each specific effort) supports these goals.

## Action Steps

- + Create opportunities for the staff and board to reflect on organizational goals and how collaboration can help achieve those goals.
- + Create goals for your organization in the collaboration.
- + Be clear about what added value you see from collaborating with others.

## SECTION 2

**Determining how you fit into the landscape.** Once a grantmaker has clarity on goals, the next step is to reflect on the role (or roles) it is able and willing to play in collaboration.

## Action Steps

- + Scan the landscape of the field you are in or a network you are — or would like to be — a part of. Consider doing some field or network mapping. What connections do you have? What connections does the field or network need? What gaps in knowledge, skills or connections exist in your field or network? Where can your organization add value?

- + Create space for the staff and board to discuss the role (or roles) the organization is willing to play in collaborative efforts. Under what circumstances are you comfortable being a vocal leader? A convener? A backbone? Or is your preference to be a partner via funding only?
- + Have explicit conversations with partners and potential partners about their goals.

## SECTION 3

**Laying the groundwork through relationship building.** Trust is critical for building collaborative relationships, as is flexibility and a willingness to sometimes give up control.

## Action Steps

- + Prioritize relationship building to help strengthen trust. This can be inside your organization, with grantees or with other partners. Seek out opportunities to engage with potential partners in one-on-one conversations. Ask for feedback, accept what you hear and act on it when you can.
- + Consider your application, reporting requirements and other processes through the eyes of grantees and other collaborative partners. In what ways might your organization be inadvertently signaling distrust in grantees and other stakeholders? What adjustments can you make? Ask grantees for their opinions.
- + Take stock of your current cultural fluency and your ability to address power dynamics. What more could you do to help equip your staff and board to work with others who are different from them and to level the playing field when necessary?

## CHAPTER 2

# Making Changes to Be Able to Flex Collaborative Muscles

## SECTION 1

**Building diverse and committed leadership.** Organizations must ensure leadership buy-in for collaboration and the time and resources it will require.

## Action Steps

- + Consider how your board can model relationship building and engage more with other funders, grantees and the communities you serve.
- + Identify the qualities you want leaders to exhibit to signal a collaborative culture. If there are gaps, consider ways you might develop these qualities in existing leaders, or bring new leaders on the staff or board to fill those gaps.
- + Interviewees found that adding more diverse voices to the board helped create a more collaborative spirit among the board. Consider the makeup of your board and staff. To what extent does your organization reflect the community you want to serve? What changes might you make to engage more diverse perspectives in your work?

## SECTION 2

**Focusing on communication.** Frequent communication — internally and externally — is critical for building strong relationships and ensuring that all partners and stakeholders are aligned on the vision of the collaboration and what's happening.

## Action Steps

- + Build in regular and frequent time for updates and check-ins. Doing so helps you engage your internal stakeholders by keeping them up to speed and helps you check alignment with your external partners.
- + Err on the side of overcommunicating. Remember that some may not be as engaged in the work as others; repetition and reminders may be needed to help make sure everyone is on the same page.

## SECTION 3

**Providing the resources required.** Collaboration requires resources — both time and money.

## Action Steps

- + Take a look at staff workloads. How much time and flexibility does staff have to engage in collaborations? What additional capacity might be needed?

- ✦ Consider the skills and behaviors needed for staff to advance your collaboration goals. What behaviors would you like to see? What skills might you need to build?
- ✦ As you add to staff workloads, think about what is less important with a greater emphasis on collaboration. What adjustments might you need to make to job descriptions? What priorities might need to shift?
- ✦ What other things, besides changing staff, could you do to make more time for collaborative work, such as reconfiguring roles, streamlining workflows and so on? How could responsibilities be divided differently among staff? Could you stop doing some things?

## SECTION 4

**Ensuring collaboration remains a priority.** Keep a focus on collaboration in job descriptions, performance goals and professional development.

### Action Steps

- ✦ Review job descriptions and consider what revisions might be necessary to ensure that collaboration is a priority. Some grantmakers have even changed titles from “program officer” to titles that evoke more of an external orientation, such as “network officer” or “community partner.” They also have meaningfully rewritten job responsibilities to reflect this orientation.
- ✦ Build collaboration into staff performance goals.
- ✦ Consider the skills or capacities staff will need to become more collaborative, and provide professional development to build those skills. For many grantmakers, these skills include facilitation and relationship building.

Building collaborative muscles requires hard work and practice, and the work will be messy at times. “There is going to be a degree of trial and error to get comfortable with this way of working, and that’s okay,” said Beth Smith of The Hyams Foundation. But you won’t get there if you don’t try. “The only way you can increase your own collaboration capacity is to just do it. Get some experience doing things and trying things out,” Smith said. Even if some of what you try doesn’t work, if you are open and honest with partners, grantees and other stakeholders, good things can result, such as modeling the way for grantees and other partners and building stronger relationships and deeper trust.

# Grantmaker Examples

- + Greater Houston Community Foundation
- + The Philadelphia Foundation
- + Gordon and Betty Moore Foundation
- + Iowa West Foundation
- + Missouri Foundation for Health

# Greater Houston Community Foundation

Catalyzing collaborations to create communities of active donors achieving greater impact on the issues they care about

## The Big Idea

Taking a donor-centered approach to collaboration, the Greater Houston Community Foundation plays a variety of roles — facilitator, convener, thought partner, researcher and fund administrator — in order to catalyze collaborations in issues that are of high interest to donors. GHCF has a practice of covering one-third of the collaborative's cost, through staff time and financial contributions; it seeks other contributions to cover the remainder to ensure the effort remains a true collaboration.

## The Story

As one of the most highly donor-advised community foundations in the United States (85 percent of their assets are in donor-advised funds), the Greater Houston Community Foundation views collaboration as an opportunity to leverage donors' investments and engage donors more deeply in

issues they care about. The foundation is currently involved in three collaborative efforts. The Strategic Education Fund and the Greater Houston Fund to End Homelessness are what the foundation calls community impact funds — pooled funds involving individual donors, private foundations and

## About the Grantmaker

The mission of the Greater Houston Community Foundation is to grow effective philanthropy by connecting donors to the causes they care about, providing excellent stewardship of assets entrusted to them and convening resources to address important community needs.

### TYPE OF FUNDER

## Community Foundation

### GEOGRAPHY/ISSUE AREA

Greater  
Houston

### TOTAL ASSETS

**\$554**  
Million

### ANNUAL GIVING

**\$97**  
Million in 2014

### NUMBER OF STAFF

**24**  
Employees

WEBSITE: [WWW.GHCF.ORG](http://WWW.GHCF.ORG)

corporate donors that have their own governance structures. In both of these funds, GHCF staff serve as facilitator, convener, researcher, administrator and thought partner. The third effort is a working group of individual donors and foundations focused on human trafficking, which has also catalyzed a public-private partnership with the mayor's office and led to the creation of an anti-human trafficking coordinator in the mayor's office. In this effort, group members share communication, due diligence and research, and they track one another's grantmaking to try to align around the systemic change they want to see in the region. After just one year this approach is catalyzing change in the capacity of implementers in the field to combat human trafficking. In this case, GHCF plays the roles of facilitator, convener, advocate, researcher and thought partner; however, funds are not pooled, so the foundation is not playing the administrator role.

Renee Wizig-Barrios, senior vice president and chief philanthropy officer, described some preconditions the foundation considers before engaging in a collaboration. First there must be a clear connection between the collaborative and donors' interests, per the foundation's mission of connecting donors to the issues they care about. "Our model is focused on partnering with donors to achieve impact. We are constructing platforms for high-engagement philanthropy in order to make this happen. Whenever we see an opportunity to engage in collaboration, the first question we ask is, 'Do we have donors who are passionate about this subject and who might want GHCF to play a role?'" Wizig-Barrios said.

Second, the foundation is committed to ensuring that the role it plays is indeed filling a gap. "We are at an exciting time in Houston, where lots of foundations are leading collaborations," Wizig-Barrios said. "We're not interested in taking up space from others who want to lead." Often, part of the gap the foundation is helping to fill includes content expertise, convening and facilitation.



A key way the foundation signals its commitment to any collaboration it is involved in is through the willingness to invest resources — both money and staff time. The foundation has invested its own resources to cover at least one-third of the cost to do the work, including staff time, in its collaborations. The participating donors cover the remaining costs. In addition, in 2015, the foundation board approved a new philanthropic leadership fund, the purpose of which is to allow the foundation to incubate new philanthropic initiatives, including collaborations. The foundation also maintains focus on collaboration by making it part of

the organization's goals and including it in the top four priorities in performance goals of staff who are directly involved in the collaborative efforts.

“We see our work in leading and convening donor collaborations as a central part of our mission as a community foundation. It has been a meaningful learning journey for our staff and for the donors engaged in the collaboration. Together we all feel a sense of satisfaction about the impact we have created so far, and we strive for continuous improvement,” Wizig-Barrios said.

#### LEARNING NOTES

### + For true collaboration, share the costs with other funders.

Although GHCF's practice is to contribute one-third of the cost of running a collaboration in terms of staff time and financial resources, it looks to other partners to chip in to help decentralize control and to influence and nurture the spirit of collaboration. ***How might you apply a similar mindset to your collaborations?***

### + Use your convening power.

GHCF considers its convening power to be one of its greatest assets in connecting donors to the issues they care about. ***How might you use your connections and convening power to foster collaboration?***

### + Seek to fill in the gaps.

The foundation looks for ways to play roles that can best serve community needs without duplicating efforts. ***Where or how might you have an impact where other funders or partners are not?***

### + Tie collaboration to staff performance.

The foundation uses a list of core competencies to assess how well staff are able to foster collaboration (see page 23). ***What assessment criteria do you currently use, and how well does it measure staff's ability to be collaborative?***

# The Philadelphia Foundation

Balancing flexibility and intentionality to be a collaborative partner

## The Big Idea

The Philadelphia Foundation practices what it preaches to nonprofits about coordinating efforts and collaboration through underwriting and convening leadership for a pooled fund to support collaboration among local nonprofits and through involvement in other collaborative efforts.

## The Story

Collaboration became a priority for The Philadelphia Foundation because it seemed like a smart and efficient thing to do. The Philadelphia region has approximately 15,000 nonprofits, and TPF helps these organizations consider how they can work together for greater impact. At the same time,

although TPF is one of the region's primary funders of capacity building, it is not the only one. TPF staff members and those from another local grantmaker recognized their mutual interest in building nonprofit capacity by funding strategic collaboration. They observed the inefficiency of grantees managing

multiple relationships and processes, often for the same project. Over time, they began to refer applicants to one another, accept a common application for some projects, conduct coordinated site visits, and organize educational sessions on strategic collaboration for both funders and nonprofits. As other foundations expressed interest in working together in this way, TPF decided to research national models involving pooled funding for collaboration and invested in hiring a consultant to work with a group of interested local grantmakers to explore a structure for a coordinated local fund. It turned out that financial and philosophical support for a repositioning fund existed not just in the region but also nationally.

Communicating and coordinating with other capacity-building funders helps streamline the experience for grantees. “In the same way that we expect nonprofits to collaborate, we have to do it ourselves as funders,” said Ana Lisa Yoder, TPF’s director of grantmaking and special projects. “It would be disingenuous for us not to practice what we preach.” In addition to articulating a value around collaboration, Yoder credits having the flexibility in her position as being a critical component of being able to build relationships with other funders and grantees.

TPF staff track how they spend time on each partnership and collaboration. “While time studies are not an exact science, they can be helpful in guiding our decision-making and in helping us understand what it takes to do this type of work,” Yoder said. When an opportunity for collaboration presents itself, past time studies showing the number of hours logged in each phase can help TPF staff estimate their capacity to contribute to an effort and determine what role the organization can realistically

## About the Grantmaker

The Philadelphia Foundation has been committed to improving the quality of life in Bucks, Chester, Delaware, Montgomery and Philadelphia counties since 1918.

### TYPE OF FUNDER

## Community Foundation

### GEOGRAPHY/ISSUE AREA

Southeast  
Pennsylvania

### TOTAL ASSETS

**\$370**  
Million

### ANNUAL GIVING

**\$20**  
Million

### NUMBER OF STAFF

**27**  
Employees

WEBSITE: [WWW.PHILAFFOUND.ORG](http://WWW.PHILAFFOUND.ORG)

take. Staff members are able to trust that if a particular project becomes more time intensive than anticipated, other work may be redistributed among team members.

According to Yoder, frequent communication as the collaborative projects evolve is also critical in ensuring that everyone in the organization understands what's happening across different collaborations. This means taking time at every staff meeting and individually with key internal stakeholders to provide updates on various initiatives, including any roadblocks that are slowing progress. "It's important to educate as much as possible. If goals take longer to achieve, everyone is in the loop about why," Yoder said.

"Getting the needed buy-ins from multiple partners and working through specific concerns takes not just

time but also a strong commitment to achieving a final result that everyone is comfortable with," Yoder noted. "In many ways, it serves as a model for the type of collaborative projects we are ultimately supporting."

In October 2015, TPF joined with its regional association of grantmakers and seven other funders to announce the Nonprofit Repositioning Fund, a pooled fund to support collaboration among nonprofits in the region. As one of the primary initial drivers for the initiative, the foundation maintains a leadership role through the fund's steering committee. The implementation is now a project of Philanthropy Network Greater Philadelphia. TPF has also run a learning lab for nonprofits, consultants and funders related to shifting intergenerational dynamics in nonprofits, and it has partnered with the local United Way to develop and run a nonprofit board leadership institute.

#### LEARNING NOTES

##### + Practice what you preach.

The Philadelphia Foundation places a value on being a collaborative grantmaker, largely because the foundation is asking its grantees to do the same. ***In what ways do your practices around collaboration mirror what you ask of your grantees? Where might you need to work for better alignment?***

##### + Balance flexibility with intentionality.

While TPF staff have flexibility in their positions to be nimble and responsive to opportunities for collaboration, they also pay attention to how they're spending their time to help check whether the time spent seems worthwhile. ***How can you balance the need to be nimble and flexible for collaboration with the need to ensure that staff are using time and resources wisely?***

# Gordon and Betty Moore Foundation

Investing in relationship building and network weaving to coordinate efforts across grantees for greater impact

## The Big Idea

When the Gordon and Betty Moore Foundation decided to invest in weaving together and supporting networks for greater impact in ocean conservation, some key aspects of the foundation's culture were critical for fostering the right type of grantmaker-grantee relationship collaborative efforts.

## The Story

For the Moore Foundation, supporting collaboration is critical for reaching desired impact. "We realized that funding a bunch of organizations one-on-one was not adding up," said Meaghan Calcari Campbell, a program officer in marine conservation. "We wanted to take a

more networked approach." As a result, Calcari Campbell has taken on the role of network weaver, connecting organizations working toward a common vision and helping them get to shared goals and greater alignment so that collectively they can achieve more.

## About the Grantmaker

Intel founder Gordon Moore and his wife, Betty, established the Gordon and Betty Moore Foundation to have enduring impact in the areas of environmental conservation, patient care and science in San Francisco and around the world.

### TYPE OF FUNDER

## Family foundation

### GEOGRAPHY/ISSUE AREA

Environmental  
conservation,  
science,  
patient care

### TOTAL ASSETS

**\$5**  
Billion

### ANNUAL GIVING

**\$250**  
Million

### NUMBER OF STAFF

**93**  
Employees

WEBSITE: [WWW.MOORE.ORG](http://WWW.MOORE.ORG)

Calcar Campbell pointed to two aspects of the foundation's culture that helped foster a collaborative spirit. The first is a systematic approach to strategy and goals, where the foundation incorporates feedback from the field, stimulating collaborative conversations with grantees and partners that often germinate into grant ideas underneath the strategy. The foundation's goals and objectives are on a 10-year cycle, with milestones and annual objectives to help guide progress along the way. Each year the foundation reviews and refreshes the strategy, with input from grantees and other stakeholders, to respond not only to what they're learning but also to changing circumstances. The grants — even multiyear grants — are treated the same way.

The second aspect of the foundation's culture that has been helpful is a spirit of creativity. "At the Moore Foundation, if we can dream it, we can do it," Calcar Campbell said. "There's a mentality that the sky is the limit when it comes to what we can do as program officers, in terms of tactics to support and sectors to engage, as long as it's aligned with the high-level strategy."

Calcar Campbell has made some creative decisions to strengthen the network of organizations working in marine conservation. As part of the foundation's goals for comprehensive ocean planning, Calcar Campbell provided funding to create a position for an independent facilitator and network weaver to support collaboration among a group of environmental organizations in British Columbia, Canada. These organizations were involved in drafting the job description and narrowing the type of person who would be suitable. It took time, however, for the organizations to become more comfortable that the new facilitator was not replacing them and was instead enabling them. In addition, Calcar Campbell and other program officers at the foundation organize an annual retreat for grantees,

with up to 150 people attending each year. The purpose of the retreat is to build relationships among organizations working on similar strategies in various locations, provide training and skill building in areas where grantees want to learn more, and start conversations about shared strategies, goals and adaptive management.

“We put a lot of work into making the three days useful for grantees, because we know we’re in a power position of asking them to come, and they’ll come,” Calcari said. “Once we have everyone together, the value is there, because the most important thing is creating that space for these groups to share and generate solutions for problems across places and strategies.”

The environmental nonprofit network Calcari Campbell helped catalyze in British Columbia has been able to unite around some shared goals and articulate how each organization contributes to those goals. The network came together recently at a barbecue that Calcari Campbell attended. “After 10 years of working together, it was a nice opportunity to reflect on the outcomes they’ve been able to achieve,” she said. “Working together for as long as these groups have can be a virtue and a vice. The longer you work together, the more opportunity for conflict there is based on the messiness of social change and collaboration, and this network has not been immune to conflict. But they were able to put that aside and come up with a common vision, and now they are starting to see the payoff.”

## LEARNING NOTES

### + Operate with flexibility and curiosity.

The foundation knows its goals are iterative, and it takes the time to hear community voices as adjustments are made. In addition, staff operate with a sense of curiosity for what could be possible. ***To what extent are you flexible with your goals and with taking the time to imagine or learn about the different paths to meet them?***

### + Devote time to relationship building.

Staff at the Gordon and Betty Moore Foundation organize grantee retreats and spend social time with some grantees to deepen relationships and encourage constructive candor across networks. ***What can you do to build stronger relationships with grantees and other stakeholders?***

### + Support the backbone.

The network for comprehensive ocean planning required funding a full-time, independent position. ***In what ways can you support the backbone function that is often critical for keeping collaborations running?***

# Iowa West Foundation

Pursuing collaboration through strategic initiatives to leverage grant investments

## The Big Idea

As the Iowa West Foundation has shifted from reactive grantmaking to more funding through strategic collaborative initiatives, foundation staff have also shifted their focus to become better trained in soft skills such as facilitative leadership.

## The Story

According to president and CEO Pete Tulipana, the Iowa West Foundation is a private foundation that acts like a community foundation. Its mission is to improve the quality of life and strengthen communities in southwest Iowa through the focus areas of place making, education, economic development and healthy families.

After a strategic planning process a few years ago, the Iowa West Foundation made a shift from reactive grantmaking to proactive initiative work. In the initiative work, the foundation identifies an area it wants to affect and then invites partners — including other funders, city and county governments, and other key organizations — to



co-design the initiative and the funding plan. To do this, they ask: What is currently available? What has worked in other similar-sized cities? What is the most efficient and effective way to create an impact?

Examples of collaborative initiatives in which the foundation is involved include Pottawattamie Promise, a partnership of other private foundations; Iowa Western Community College and two community school districts, to address preparation, access and completion of postsecondary education; a mental health initiative in schools; and several economic development initiatives. The efforts are a mix of pooled funds and aligned funding. In several collaborations, the Iowa West Foundation plays the administrative, backbone role.

“Unless we want to write the check for everything, we have to engage people and bring them into the process,” Tulipana said. “In doing that, we can uncover new partners who can help us, while also encouraging people in the community to invest in new ways.”

The shift to more proactive funding through collaborative initiatives has led to other changes as well. “Work on our more traditional, reactive grantmaking side is decreasing as the initiative work is increasing,” Tulipana said. “As we’ve sharpened our focus and are creating more long-term, impactful solutions with our initiatives, fewer grant requests are coming in as needs are being met in the long term, allowing nonprofits to focus on other priorities.”

## About the Grantmaker

The Iowa West Foundation, which receives funding through investments and income from the Iowa West Racing Association, works to improve the quality of life and strengthen communities in southwest Iowa.

### TYPE OF FUNDER

## Private foundation

### GEOGRAPHY/ISSUE AREA

Southwest Iowa

### TOTAL ASSETS

**\$380**  
Million

### ANNUAL GIVING

**\$20**  
Million

### NUMBER OF STAFF

**09**  
Employees

WEBSITE: [WWW.IOWAWESTFOUNDATION.ORG](http://WWW.IOWAWESTFOUNDATION.ORG)

Staff are spending more time designing and facilitating collaborative initiatives, which involves lots of planning, coordination among many players and frequent communication. Tulipana has found that this type of work requires a specific skill set.

“There’s an analytical skill set that staff members need to have, around researching, analyzing, evaluating and conceptualizing,” Tulipana said. “There’s also another skill set around facilitative leadership. How do you lead in a community in a facilitative way that makes people feel good about being at the table? You might think through the

problem and analyze how the community should move forward, but if you don’t have the skill set to bring people along with you, then you won’t be able to make much progress.” Staff have received training in facilitation to help build this skill set.

Tulipana also sees an important part of his role to be out in the community, building relationships and setting the tone for collaboration. “If we lead well and move the community, we can have a huge impact,” Tulipana said. “I feel a tremendous responsibility not to take that lightly, to think big and encourage the community to think big.”

#### LEARNING NOTES

### + Build the collaborative skill set of staff.

Staff at Iowa West Foundation have taken steps to develop their facilitative leadership skills. ***How can you build your staff’s soft skills to enable them to be better collaborators?***

### + Leverage your leadership platform.

Tulipana sees a personal responsibility to champion big ideas and collaboration in his community. ***In what ways can you leverage your platform, regardless of where you sit in the organization, to advance the values that are part of the collaborative mindset (page 4)?***

# Missouri Foundation for Health

Using facilitation skills and developmental evaluation tools to build a more collaborative relationship with partners

## The Big Idea

When the Missouri Foundation for Health engaged three grantee organizations to play a backbone support role in a new collective impact initiative focused on reducing infant mortality, foundation staff deployed facilitation skills and developmental evaluation tools to help shift the nature of the relationship between grantmaker and grantees.

## The Story

The Missouri Foundation for Health launched a collective impact initiative in two regions in Missouri. The goal is to reduce infant mortality by 15 percent over 10 years in these regions. Two years into the initiative, the foundation has formed partnerships with three nonprofit organizations that will serve as the backbone organizations in

the two regions; together these organizations have done outreach to the community to form steering committees and engage additional partners.

As the foundation engaged the backbone partners in the exploration and planning of the first year, staff quickly realized they needed to find a way to change

## About the Grantmaker

Missouri Foundation for Health is a resource for the region, working with communities and nonprofits to generate and accelerate positive changes in health.

### TYPE OF FUNDER

## Private foundation

### GEOGRAPHY/ISSUE AREA



### TOTAL ASSETS



### ANNUAL GIVING



### NUMBER OF STAFF



WEBSITE: [WWW.MFFH.ORG](http://WWW.MFFH.ORG)

the relationship with their grantees to shift away from a typical grantmaker-grantee dynamic. This required both grantmaker and grantees to think and act differently.

“When I first became a program officer, it seemed my role was to read applications, recognize the best organizations based on their proposal and visit organizations to monitor their progress, to the extent possible,” said Kathleen Holmes, program director. “In this initiative, however, we’re much more intimately involved with the backbone organizations; we are relating to these organizations much more as partners as opposed to grantees, and that requires a different set of skills.”

Holmes said some of these skills are strong communication, the ability to facilitate conversations that surface differing points of view, and a comfort with complexity and uncertainty.

“You have to be okay with ambiguity, and that’s not a strong point for a lot of foundation staff. We often want things systematically spelled out and done. I’m one of those people,” Holmes said. “So I had to learn to look at things differently, to appreciate what’s going on when there’s a lot of uncertainty. At some point you need to be challenged, as the uncertainty and ambiguity is where the creativity happens. You can’t try to force things.”

Just as Holmes and her team were adjusting to a new way of working with their partners, the backbone organizations also had to adjust their expectations of the relationship with the foundation.

“As program officers, grantees often expect us to be experts, but there’s also an expertise in the community that’s extremely important to tap into,” Holmes said. “We found that to be a significant barrier initially, because the organizations we work with were relying on our previous relationships, where we had said, ‘This is what we want you to accomplish.’ Now we are going into this without a plan, we want to develop it with them, and that is

uncomfortable for the organizations. It is important for us not to fall back to our default way of working with them, and rather be as uncomfortable as they are and work through it.”

Holmes said another challenge was helping grantee partners look at the issue of infant mortality from a systems perspective and sorting through differing viewpoints about the causes, barriers and opportunities for impact. Holmes found developmental evaluation tools valuable in working through these challenges. For example, when confronted with differing viewpoints about to what extent the initiative should focus on the role of the individual versus systemic causes of infant mortality, the foundation, with the help of a developmental evaluation consultant, created a survey to provide a space for partners to share their thoughts and opinions.

“The survey allowed counter opinions to be expressed, and it began to open people to other ideas,” Holmes said. “It helped us set the stage for a more systems approach to this issue.” Other tools that have been helpful include before-and-after action reviews and the emergent learning table.<sup>4</sup>

“A lot of this work is about process, and people get irritated when you’re stuck in process a lot of the time,” Holmes said. “But these tools help move people toward action and reflect on that action. They allow you to surface insights when you have a complex issue and the answer’s not real obvious; they help lift differing viewpoints and hypothesize what it’s going to take to get toward impact. Then you’re able to test those hypotheses really quickly and put that learning back into the process. The tools get people engaged and allow everyone’s voices to be heard.”

## LEARNING NOTES

### + Acknowledge power dynamics.

Staff at the Missouri Foundation for Health took intentional steps to try to mitigate the power imbalance with grantees. ***In what ways can you address power dynamics for stronger relationships in your collaborations?***

### + Help partners “see the forest for the trees.”

Often, advancing a collaborative vision requires partners to take a systems-level view on the issue. Some organizations may not bring this lens to their work. ***How might you help partners learn to take a broader or systems view?***

<sup>4</sup> For more on developmental evaluation, see J.W. McConnell Family Foundation, “A Developmental Evaluation Primer,” 2006, available at <http://www.mcconnellfoundation.ca/de/resources/publication/a-developmental-evaluation-primer>; Jewlya Lynn, “Strategic Learning in Practice: Tools to Create the Space and Structure for Learning,” (Spark Policy Institute and Center for Evaluation Innovation, 2012), available at [http://www.evaluationinnovation.org/sites/default/files/SL\\_Tools\\_FINAL%20.pdf](http://www.evaluationinnovation.org/sites/default/files/SL_Tools_FINAL%20.pdf); and FSG, “Building a Strategic Learning and Evaluation System for Your Organization,” 2013, available at <https://www.fsg.org/publications/building-strategic-learning-and-evaluation-system-your-organization>.

# Appendix A: What Are the Different Ways to Collaborate?

For the purposes of this publication, we define collaboration as groups of funders, nonprofits and other stakeholders aligning around a shared vision and targeting resources and activities in support of that vision.

Collaboration can come in many different forms, ranging from low to high involvement. Some of the most common forms of collaboration include networks, coalitions, movements, strategic alliances, strategic co-funding, public-private partnerships and collective impact initiatives. Other forms not discussed in the following table include learning

communities and knowledge exchange. While not an exhaustive list, the table breaks down some of the most common forms of collaboration in the nonprofit and philanthropic sector and provides guidance and considerations for when and how to use them. These types of collaboration are not mutually exclusive and, in practice, can ebb and flow into each other.

In any form of collaboration, funders need to ensure that the structures they put in place are reducing the burden on the organizations they seek to benefit and add significant value to the work.

TYPE	PARTICIPANTS	WHEN TO USE IT	CONSIDERATIONS
<p><b>Networks:</b> people connected by relationships that can take on a variety of forms, both formal and informal</p>	<p>Nonprofits, foundations, government agencies, businesses or individuals</p>	<ul style="list-style-type: none"> <li>• Networks can connect people to allow easy flow of and access to information; align people to develop/spread ideas; and foster joint action for specific outcomes.</li> <li>• Networks can be helpful when you don't have a clear set of outcomes but rather an understanding that linking to the work of others can advance your and their objectives.</li> </ul>	<ul style="list-style-type: none"> <li>• Networks require a long timeframe and lots of flexibility.</li> <li>• The outcomes of the work are not always clear; members should be comfortable with contributing to the network's overall success and not being able to claim credit for discrete results.</li> </ul>
<p><b>Coalitions:</b> organizations that commit to an agreed-on purpose and shared decision-making to influence an external institution or target, while each member organization maintains its own autonomy</p>	<p>Nonprofits, foundations, government agencies, businesses or individuals</p>	<ul style="list-style-type: none"> <li>• Coalitions work well when participants work to advance discrete outcomes on a single issue — for example, a specific policy change.</li> <li>• Coalitions are useful when the goal is to align work toward the desired outcome or strengthen intersectionality and bring together constituencies across issues.</li> </ul>	<ul style="list-style-type: none"> <li>• Cross-sector collaboration is complex.</li> <li>• The issues that coalitions focus on often require long timeframes.</li> <li>• Attribution is sometimes difficult to discern (which can be a challenge for funders if they want to see the impact of grants on particular groups within coalitions).</li> </ul>

TYPE	PARTICIPANTS	WHEN TO USE IT	CONSIDERATIONS
<p><b>Movements:</b> collective action with a common frame and long-term vision for social change, characterized by multidirectional mobilization that works to address a power imbalance; often include ecosystems that contain other forms of collaboration</p>	<p>Nonprofits, foundations, government or businesses can contribute to movements, but the people most affected by the issue(s) must drive them</p>	<ul style="list-style-type: none"> <li>• Movements can address complex, systemic challenges.</li> <li>• Movements are often multisector or multi-issue initiatives that engage beneficiaries.</li> <li>• Funders do not necessarily drive, but can support, efforts.</li> </ul>	<ul style="list-style-type: none"> <li>• Movements require long timeframes and flexibility; historically they work best when using a bottom-up approach to shaping the agenda.</li> </ul>
<p><b>Strategic alliances:</b> partnership among organizations working in pursuit of a common goal while maintaining organizational independence; could mean aligning programs or administrative functions or adopting complementary strategies</p>	<p>Nonprofits or foundations</p>	<ul style="list-style-type: none"> <li>• Consider strategic alliances for nonprofits or funders with complementary missions, ideally with an established relationship or a prior history of working together in some way.</li> </ul>	<ul style="list-style-type: none"> <li>• Strategic alliances will most likely succeed when the organizations involved are shaping how the collaboration will work.</li> <li>• Funder-driven alliances typically don't work.</li> </ul>
<p><b>Strategic co-funding:</b> organizations that work in pursuit of a common goal by aligning their resources to make more efficient progress on the goal; a different version of this work is pooled funding or strategic alignment of funds</p>	<p>Grantmakers, including private philanthropy, individual donors, family foundations, corporate funders or government</p>	<ul style="list-style-type: none"> <li>• Strategic co-funding can have a greater impact because of the larger flow of resources to the issue or cause.</li> <li>• It can be a good option when pursuing a common vision and funding the same grantees or when a funder wants to tap the wisdom and experience of other funders.</li> <li>• Leverages resources, enables larger reach, enables expanded set of grantmaking strategies and minimizes risk.</li> </ul>	<ul style="list-style-type: none"> <li>• Strategic co-funding can vary structurally, with some forms maintaining individual funding autonomy more than others.</li> <li>• Structures put into place should reduce the application and reporting burden on the organizations they seek to benefit.</li> </ul>
<p><b>Public-private partnerships:</b> partnership formed between government, philanthropic or charitable, and private-sector organizations to deliver specific services or benefits</p>	<p>Government agencies, partnering with nonprofits, foundations and businesses</p>	<ul style="list-style-type: none"> <li>• Government agencies, partnering with nonprofits, foundations and businesses</li> </ul>	<ul style="list-style-type: none"> <li>• Working with government and the private sector adds complexity.</li> <li>• These partnerships require a long timeframe and buy-in from leadership within each entity.</li> <li>• Sometimes government accountability mechanisms create a substantial additional burden to grantees.</li> </ul>
<p><b>Collective impact initiatives:</b> long-term commitments by a group of influential actors from different sectors to a common agenda for solving a specific social problem</p>	<p>Nonprofits, foundations, government agencies, businesses and individuals</p>	<ul style="list-style-type: none"> <li>• Use collective impact for situations in which the issue is complex, engages multiple sectors and requires long-term systems change (e.g., changes in policy, changes in public and philanthropic funding, changes in cultural norms).</li> <li>• Collective impact efforts require a significant number of both leaders and community members to come together to achieve change.</li> </ul>	<ul style="list-style-type: none"> <li>• Collective impact initiatives, as framed by FSG, must meet five criteria: (1) common agenda, (2) shared measurement system, (3) mutually reinforcing activities, (4) continuous communication and (5) backbone support.</li> <li>• Collective impact efforts tend to have at least dozens (if not more) cross-sector partners coming together, with multiple cascading levels of collaboration.</li> </ul>

# Appendix B: Collaboration in the Field

## GEO's work on collaboration

Over the years, GEO has partnered with a variety of organizations to develop content, conferences and other programming to advance grantmaker knowledge and practice related to collaboration.

- In 2011, GEO partnered with **Monitor Institute** to host a conference on networks and to co-publish *Catalyzing Networks for Social Change: A Funder's Guide*, which provided an orientation for grantmakers to understand networks for social change and the potential impact of embracing networked ways of working.
- In 2013, GEO, **Ashoka, Social Impact Exchange, Taproot Foundation and TCC Group** co-published *Pathways to Grow Impact: Philanthropy's Role in the Journey*, which noted that grantmaker support for networks is useful no matter what strategy organizations use to grow their impact.
- Also in 2013, GEO held a convening on strategic co-funding and partnered with **REDF** to publish *Strategic Co-Funding: An Approach for Expanded Impact*, an updated version of a guide published four years earlier, to provide an overview of possible approaches for grantmakers. In that same year, GEO held a conference focused on supporting movements and published *Many Hands, More Impact* to provide a framework for understanding the possible roles grantmakers can play in supporting social movements.
- In 2014, GEO and the **Haas Business School at University of California, Berkeley**, co-published *Cracking the Network Code: Four Principles for Grantmakers*, which digs deeper into the mindset shifts necessary to be an effective network participant and ways grantmakers can support networks.
- Also in 2014, GEO also signed on as a co-catalyst partner in the **Collective Impact Forum** and helped inform the development of the Forum's community of practice for funders that are investing in collective impact.

These contributions and a host of other GEO resources on collaboration are available at [www.geofunders.org/collaboration](http://www.geofunders.org/collaboration).



## Other work in the field

Of course, in addition to the partners listed above, many others in the social sector have been working to support grantmakers and nonprofits as they strive to collaborate more effectively. Here is just a sampling:

- **The Bridgespan Group** has developed guidance for donors seeking to enter “high stakes” collaborations, as well as new research about nonprofit collaborations and the relevance to high-impact funding.
- **Building Movement Project** does research, writing and consulting to support nonprofits’ and grantmakers’ ability to support social justice movements.
- **Foundation Center and GrantCraft** have published a number of resources on collaboration, including a guide on funder collaboratives, an interactive collaboration tool finder and related report, and a database of examples of nonprofit collaborations. They are also integrating collaboration into new training curricula for 2016.
- **The Collective Impact Forum** is a field-building initiative of **FSG** and the **Aspen Institute Forum for Community Solutions** for grantmakers, backbone leaders and community partners to come together to share knowledge and support one another’s efforts.
- **La Piana Consulting** offers research and consulting support and develops resources, tools, case studies and other content on collaboration, strategic alliances and mergers for nonprofits and foundations.
- **Management Assistance Group** provides research, consulting and peer learning to people, organizations and networks working toward equity in the sharing of resources, power and privilege.
- Most recently, **Monitor Institute**, which publishes on how to leverage networks for social impact and supports networks through strategy consulting, worked with the Rockefeller Foundation to develop **ENGAGE**, a web-based guide for funders supporting networks.
- Others working to support funder collaborations include **NEO Philanthropy**, **New Ventures Fund**, **Proteus Fund**, **Rockefeller Philanthropy Advisors**, **TCC Group** and **Tides**.

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