

# COLLABORATION

# COLLABORATION

A Handbook from the  
Fund for Our Economic Future

by *Chris Thompson*

FUND FOR  
**OUR**  
ECONOMIC  
**FUTURE**



## About the Fund for Our Economic Future:

The Fund for Our Economic Future is an alliance of funders—foundations, corporations, universities, health care systems, business and civic associations, government entities, and individuals—who pool their resources and collective know-how to advance economic growth and increase access to opportunity for the people of Northeast Ohio through improved job creation, job preparation and job access, an approach called Growth & Opportunity. The Fund advances Growth & Opportunity by building shared community commitment, supporting high-impact collaborations and marshalling strategic funding. Since 2004, the Fund has raised more than \$100 million to support its efforts, which have helped retain or create more than 21,500 jobs, add \$930 million in payroll, and attract \$5.3 billion in capital to Northeast Ohio.

## About the Author:



Chris Thompson

Chris Thompson joined the staff of the Fund for Our Economic Future in 2007 and spent more than nine years helping its members and partners improve their ability to work together to achieve enduring, positive community change. As director of regional engagement, Chris helped Fund members and civic leaders across Northeast Ohio to design, implement and support multiple cross-sector collaborations that improved job creation, job preparation and job access outcomes. Chris left the Fund in July 2016 to launch a consulting practice, Civic Collaboration Consultants LLC, focused on sharing the Fund's

“collaboration know-how” with a broader audience. He continues to serve the Fund as a consultant, providing collaboration training and project management services to its members, grantees and partners.

## TESTIMONIAL



*“Collaboration is really hard work. And no one knows its ins and outs, ups and downs better than Chris Thompson and the Fund for Our Economic Future. They’ve been working behind the scenes all over the region for more than a decade to make effective collaboration happen. And now we have their secrets to success distilled in one place.”*

**Mark Samolczyk**

President and CEO | Stark Community Foundation

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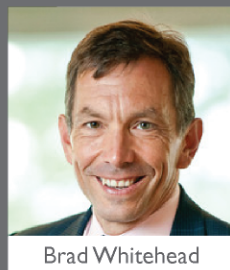
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*“We hope this handbook will be useful to others in Northeast Ohio and beyond who are working to support large-scale civic change.”*

## FOREWORD

A few years back, I participated in a meeting with leaders from six metropolitan areas from across the United States, convened by the Brookings Institution to brief White House leaders on regional economic efforts. I fully expected this conversation to revolve around the “what” of economic competitiveness.



Brad Whitehead

While there was plenty of discussion around industry clusters, workforce systems reform and transit-oriented job centers, the conversation became most animated around the challenges of “how.”

It turns out that identifying the necessary elements of an economic strategy was the (relatively) easy part. The specifics varied depending on the different metros’ assets and history. But generally speaking, the strategy elements and general directions were similar. What was most challenging—and most variable—were the approaches used to align stakeholders around the many parts that have to hang together for transformational economic change to occur.

Indeed, that Washington meeting sparked a multiyear conversation among the participants that we referred to as our therapy group for civic collaboration. We would regularly convene and otherwise reach out to share our successes, failures and reflections on the complexities of working across sectors and geographies.

Much is known about what factors drive an economy and our Fund is proud to have contributed to this body of knowledge over the last 12 years. Less is known about the underpinnings of successful civic collaboration. Think of it as the sociology of growth. Our Fund embraced the criticality of collaboration and the necessity of working through networks early in our history in order to achieve broad, systems-level changes in our business development, entrepreneurial, land use, job preparation, and innovation strategies.



We began this work through an Engage & Empower Committee, which worked with several of our higher education members to catalog and assess the many civic partnerships operating in the region. We then used that analysis to guide our own plans. We also read voraciously and reached out constantly to academics, consultants and fellow funders around the globe who have sought to understand collaboration, whether it be known as “collective impact” or some other term.

Above all else, we have learned by doing. We’ve had our share of notable failures, and a few glorious successes. But mostly, we’ve engaged in a lot of earnest collaborative work that has delivered high returns and tangible outcomes to our community, yet has fallen short of its full potential. As we are fond of saying at the Fund, we call this progress “a good start.”

We asked Chris Thompson—who was with our Fund since its early days and recently moved into the consulting world—to pull together his thoughts on our collaboration work in hopes that our Fund will improve its own performance by codifying and learning from our experiences. Indeed, this project began as a checklist we planned to incorporate into our grantmaking due diligence. If you seek funding from us and you intend to work collaboratively, you are well-advised to pay heed to these messages! If nothing else, you will understand the lens through which we increasingly view the region.

We also hope the handbook will be useful to others in Northeast Ohio and beyond who are working to support large-scale civic change. While the cases put forth are particular to economic competitiveness in Northeast Ohio, the lessons are intended to be universal. We find it particularly relevant that this handbook is being jointly published by our community foundation members—the Community Foundation of Lorain County, the Akron Community Foundation and the Stark Community Foundation—since they so often serve as a gathering place for civic discussion and the embodiment of collective action.

For nearly the last 10 years, Chris has had a front-row seat to some of the biggest and most critical collaborative efforts in the region. He knows of what he speaks. But if you know Chris and our Fund, you also know we relish a good debate. Thus, we look forward to your reactions. Let us know where we got it right, and where your experiences differ. We will continue to update and improve this handbook so that we can move ever closer to our shared regional goal of economic growth and equitable access to opportunity.

Ever Onward,

A handwritten signature in black ink, appearing to read "Brad Whitehead". The signature is stylized and fluid, with a large, sweeping flourish at the end.

Brad Whitehead  
President | Fund for Our Economic Future

## INTRODUCTION

The Fund for Our Economic Future embodies, promotes and supports a particular kind of collaboration that engages diverse, independent stakeholders who assume shared responsibility for achieving common goals. This specific kind of collaboration can result in enduring, positive community change that we can see, feel and touch.

We embody this specific type of collaboration because our members—each very independent—assume shared responsibility through their contribution of time, money and leadership to achieve a common goal of advancing a growing regional economy that is rich in opportunity for all residents of Northeast Ohio; what we call “Growth & Opportunity.”

The collaboration our Fund represents improves the outcomes of the philanthropic system of Northeast Ohio by providing a network through which players (including foundations, institutions, businesses, and governmental units) within that system learn together; develop a shared understanding of what is possible, and work collectively to achieve common goals.

To achieve this common goal of Growth & Opportunity, we have learned that job creation, job preparation and job access outcomes across the region must improve. We also have learned that the quality of those outcomes is shaped by the performance and interactions of a complex web of independent individuals, organizations and institutions.

None of these individual stakeholders has sufficient control over others within the system to shape the system’s outcomes. Improving outcomes within such complex civic systems, instead, depends on how the stakeholders interact with each other; that is, how they collaborate. If Northeast Ohio’s economy is to be rich in Growth & Opportunity, we all need to excel at collaboration.

*“While our work is complex, our framework is very simple: Shared learning results in a shared understanding of how we can act collectively to achieve a common goal.”*

## A THREE-TIERED APPROACH TO GROWTH & OPPORTUNITY

### **JOB CREATION**

Build on distinct regional assets in order to create and retain good jobs with long-term payoffs for people of all skill levels.

### **JOB PREPARATION**

Prepare residents for current and future jobs through systems reform that promotes coordinated, employer-connected and sector-focused education and training.

### **JOB ACCESS**

Strengthen connectivity between people and jobs by breaking down spatial and social barriers to job access; promote sustainable growth patterns that enable improved access to jobs in the future.



Collaboration is both a process and a set of behaviors. Our Fund has learned how to design and implement processes that are required to catalyze enduring, positive change. And we have learned what behaviors, particularly the behaviors of key leaders within the complex civic systems in which we work (e.g., workforce development), foster effective collaboration. These lessons are relevant to achieving change in other complex civic systems, including public health, education, housing, and safety, that shape the quality of life in our communities.

These complex civic systems are rife with wicked, persistent challenges, such as infant mortality, generational poverty and economic polarization. The solutions to wicked, persistent challenges are rarely technical. That is, the answers aren't known in advance, nor can they be solved with pre-determined programs or projects. Rather, the solutions need to be adaptive. Solutions emerge from and reflect the dynamic and evolving inter-relationships among a diverse set of stakeholders in a rapidly changing environment.

***Communities that excel at cross-sector collaboration can achieve enduring, positive change; communities that rely only on technical approaches to address the complex cannot.***

The collaboration process can vary widely, but our experiences teach us that: (1) Before collaboration is even possible, specific preconditions need to be met; and (2) Effective collaborations all have three common elements—capacity, process and leadership. The following captures what we have learned through our 12-plus years of operating within multiple collaborative environments. We have the privilege of learning from many others, including our members, our grantee partners, community partners, consultants, and other champions of collaboration. Much of what is shared here has been advocated elsewhere by others, and wherever possible, we try to highlight the influence of others on our thinking and our work.

## AUDIENCE

These lessons aim to influence the thinking, beliefs and behaviors of four main audiences:

FUNDERS	INDIVIDUALS	PARTNERS	LEADERS
Funders from the private, public and philanthropic sectors; dollars greatly influence action and, therefore, funders can allocate resources in ways that promote collaboration.	Individuals who strive to catalyze enduring, positive change within their communities.	Community, institutional and organizational leaders who participate in collaborations; by definition, collaboration involves crossing boundaries, and boundary crossing requires different leadership and behaviors from those used within an organization.	Leaders tasked with the unenviable assignment of coordinating the collaboration process within a complex system; even the best designed collaborations can fall apart without appropriate leadership.

## TERMINOLOGY

**CoBLABoration:** The evil cousin of collaboration, this made-up term, first shared with our Fund by Cleveland Metropolitan School District CEO Eric Gordon, describes the all-too-common experience of what happens when stakeholders engage in a poorly designed collaboration that is unable to transition from talk to action.



**Collaboration:** A process through which independent stakeholders assume shared responsibility for achieving a mutually beneficial, common goal.

**Stakeholders:** Organizations, institutions and individuals that influence and/or benefit from the outcomes within a complex civic system; this includes funders, service providers and constituents, including those with direct experience in the system, such as students and parents within the education system.

**Complex Civic Systems:** Consist of diverse, independent stakeholders who shape outcomes within specific areas that influence the quality of life in our communities. Examples include the education system (made up of school districts, colleges, universities, tutoring programs, and dozens of other stakeholders), public health, workforce, public safety, food security, etc. Systems are not clearly defined; their outcomes cannot be controlled by one or even a small group of stakeholders; and their challenges are often adaptive.

**Partners:** Stakeholders, including funders, who agree to assume shared responsibility for achieving common goals within a complex civic system.

**Network:** The structure of a collaboration; designed by and made up of partners committed to achieving a common goal.

**Leadership:** We talk about two kinds of leadership in this handbook. Galvanizing leadership unites disparate partners behind a compelling cause that leads to collaboration, while collaborative leadership sustains the collaboration process.

# WARNING

AVOID COLLABORATION  
IF POSSIBLE!

Before we dive in, it's important to note that collaboration should only be pursued when it is absolutely necessary to achieve the desired change. Collaboration is time consuming, expensive and risky. If you must collaborate, make sure the necessary conditions are in place that make it possible.

Collaboration is unnecessary if a goal can be achieved by one organization, or even a small group of organizations working together to solve a technical challenge. For example, the goal of increasing the amount of venture capital available to high-growth potential entrepreneurs in a region can be achieved through the efforts of a handful of investors with high tolerance for risk. However, it is unlikely that such investors will be eager to provide venture capital within a community unless there is evidence that the entrepreneurs are prepared to succeed. Providing high-growth potential entrepreneurs with the support they need to attract venture capital—including access to a robust set of aligned resources such as technical advice, human capital, research capacity, and potential customers—definitely requires collaboration.

Communities can create a lot of positive, enduring change with a great program or a specific project. Collaboration should never be the goal. It is a means to the goal. Injecting collaboration into environments where technical solutions can create the desired change is unnecessary, costly and painful. It also diminishes the value of collaboration.

Collaboration is necessary if a goal requires the engagement of diverse stakeholders operating within a complex civic system. But just because collaboration is needed doesn't mean it is possible. Often the first step to effective collaboration is recognizing that the time isn't right and focusing instead on actions that build the necessary preconditions for collaboration.

*“Collaboration  
should never  
be the goal.  
It is a means  
to the goal.”*



## COMPELLING CAUSE

## GALVANIZING LEADERSHIP

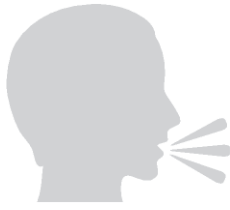
## HIGH-PERFORMING ORGANIZATION

# PRECONDITIONS FOR COLLABORATION

As Eric Gordon, CEO of the Cleveland Metropolitan School District (CMSD), cautions: “Coblaboration” is much more common than true collaboration. Coblaboration occurs when players within a system are urged to come around a table to “collaborate” around a specific issue. Too often neither those doing the urging nor those invited to the table have a shared understanding of the purpose of the collaboration. Players called to the table frequently have more urgent priorities. And more often than not, the players don’t trust each other, yet they join the table if only to make sure their organization’s funding isn’t disrupted.

Everyone at the table has an opinion (or three) about the issue in question, but there is very little data that everyone accepts as valid and relevant.

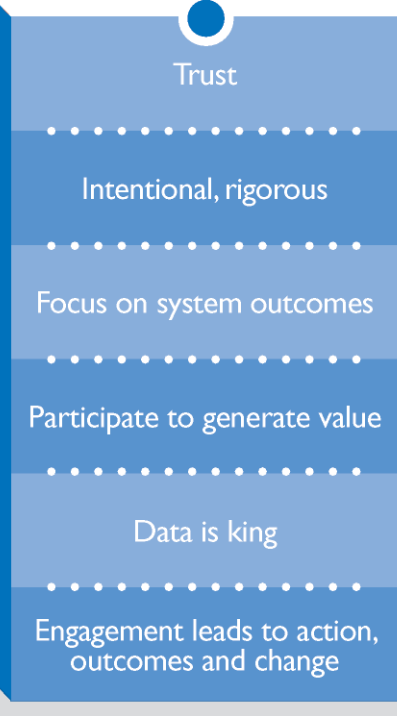
*“Collaboration requires everyone involved to change their behavior.”*



## COBLABORATION



## COLLABORATION



The chart above highlights just a few of the differences between the all-too-common “coblaboration” process and some of the characteristics of effective collaboration.

Collaboration is never easy and getting beyond “coblaboration” to true collaboration isn’t possible (and shouldn’t be attempted) unless the following three preconditions are met.



Collaboration requires everyone involved to change their behavior; some of the changes are minor and some are large. But change is required. A “compelling cause” compels us to change our behavior. We complain about many issues. We wish many conditions would change in our community. But only when we refuse to tolerate the status quo are we compelled to change. Leaders advocating for change often assume their cause is compelling—just as entrepreneurs assume their business idea is worthy of funding.

Only a compelling cause will hold diverse stakeholders together through the challenges that are inherent in any collaboration. Too often the impetus of a collaboration is the availability of funding to address an obvious need. Unfortunately, funding alone is not enough to compel stakeholders to act differently. Funding may bring stakeholders to the table, but once the funding runs out (or once stakeholders decide the funding is inadequate to meet their individual needs), most will return to their past behavior. Funders have the ability to turn an issue into a compelling cause, but that requires much more than simply putting money on the table. It requires altering other funding sources and disrupting the status quo.

**How do we know if a cause is compelling enough to make collaboration possible?** When key players within a system agree to assume shared responsibility by dedicating their leadership, resources and actions to achieving a common goal, then it’s evident the cause is compelling.

Rare is the “compelling cause” that magically materializes and compels institutions, organizations and individuals to change their behavior and align their efforts. Most of the time a “compelling cause” needs to be built.

**How do we build a “compelling cause?”** Advocates for collaboration need to engage key players within the system in a shared learning process that can lead to a shared understanding of the opportunities and advantages of catalyzing change.

For example, research by our Fund and others persuaded our members that long-term land use and infrastructure development patterns (often referred to as “no-growth sprawl”) in Northeast Ohio limited residents’ access to jobs and jeopardized the economic competitiveness of our region. However, many players within the land use and development system saw the status quo as acceptable, and were unlikely to identify job access challenges as “compelling” enough to disrupt the status quo. These players included planning agencies, governmental entities, private sector developers, economic development organizations, and transit agencies.

To help build the “compelling cause” for improved job access, our Fund helped the Northeast Ohio Sustainable Communities Consortium (NEOSCC) win a federal



grant that paid for a shared learning project called Vibrant NEO. Data and information developed through the project clearly demonstrated the costs and benefits of different development scenarios. Participants in the process developed a shared understanding of the consequences of the status quo. Indeed, the report showed that if the status quo persists for a few more decades, then no county in the region will be fiscally sound; the best performing county in the near future would be in worse fiscal shape than the worst performing county is today.

The good news: The report outlined that the fiscal health of the entire region could be improved by altering a few land use and development practices. One might think that collective fiscal peril would be compelling enough to persuade key players within the system to collaborate to achieve change. Not so. While a handful of players who participated in the Vibrant NEO process continue pushing to make this a compelling cause, effective collaboration within this complex system has yet to emerge because of the absence of the second precondition.

*“Funding alone is not enough to compel stakeholders to act differently.”*

2

COMPELLING CAUSE | **GALVANIZING LEADERSHIP** | HIGH-PERFORMING ORGANIZATIONS

As will be highlighted multiple times in this report, the absence of control within complex civic systems makes leadership more important than ever if change is to be achieved. “Galvanizing leadership” is one of the specific types of leadership required to support and sustain an effective collaboration. Galvanizing leadership unites diverse players within a system by persistently and consistently articulating the “compelling cause.” Galvanizing leadership helps other players identify why the cause is compelling within their own organization or entity. Galvanizing leadership sets the direction for the players within the system and creates a sense of urgency for immediate action.

Galvanizing leadership can come from many places within a system; it often requires dynamic, charismatic behavior. Attempts to exercise command and control leadership within a complex civic system only result in chaos and disorder. Players within a complex system rarely have the power to order each other around. Rather than using positional authority to build support for collaboration, galvanizing leaders use other forms of influence, including data, trust and personal credibility. Funders may be well-positioned to exercise galvanizing leadership because they can use their resources to get the attention of players who either

are reliant on their funding or want to have access to their dollars. However, few funders have sufficient influence over the resources in the system to effectively use only the power of the purse.

In the case of Vibrant NEO, our Fund's resources paled against those deployed by other players in the system, including the state of Ohio, and we were in no position to compel organizations and institutions to collaborate. To date, none of the other participants in the Vibrant NEO effort have been able to exercise sufficient galvanizing leadership across the scope of the region to catalyze the development of a common agenda or collective action. Some players are using the findings of Vibrant NEO to advocate for change within smaller portions of the region, but it is too early to know if those efforts will have the sufficient galvanizing leadership to forge an effective collaboration.

As we have seen over the last 10-plus years, it is indeed possible to improve the outcomes within complex civic systems, such as the entrepreneurship system in Northeast Ohio, when galvanizing leadership is present. Late businessmen Jamie Ireland and Frank Samuel jointly played a galvanizing leader role in the early 2000s to make supporting startup companies with high-growth potential a compelling cause. Ireland used both his family's reputation (he came from a wealthy, philanthropic industrialist family) and his business savvy to make the case to foundations and others that Northeast Ohio's economic

*“Rather than using positional authority to build support for collaboration, galvanizing leaders use other forms of influence, including data, trust and personal credibility.”*

future depended in part on supporting a particular kind of entrepreneur: Samuel used his experience in economic development to persuade the governor of Ohio and other key state officials that state resources needed to be focused in this area. Through their leadership, a diverse set of organizations and institutions were persuaded to invest more resources, develop new programs and pursue a common goal.

When Ireland and Samuel first began to exercise galvanizing leadership, high-growth entrepreneurs in our region were often given two words of good advice: “Leave town.” Our region simply didn't have the resources and support systems in place to help startups succeed in the global market for growth capital. Today, high-growth entrepreneurs from all over the world often hear two different words of good advice: “Move here,” as Northeast Ohio has a whole host of organizations and institutions that collaborate to help them succeed.

But galvanizing leadership alone wasn't enough to make that change happen. Long before we ask organizations to collaborate with each other, advocates of collaboration must first make sure those organizations are or aspire to be high performers.

### **How do we know if galvanizing leadership is present?**

The good news is galvanizing leadership is easy to spot. When leaders step beyond the interests of their own organizations and persistently and consistently advocate for improved outcomes within a complex system, galvanizing leadership is present. If you believe a cause is compelling, but you cannot identify an individual or an organization that is championing that cause in a way that is effectively engaging others, then your cause is in dire need of galvanizing leadership.

### **How do we foster galvanizing leadership?**

Exercising galvanizing leadership is risky business. It can be difficult to persuade ourselves and/or others to step beyond the walls of our own organization and provide leadership across a complex system we cannot control. One lesson our Fund has learned is that many organizational leaders don't recognize the need for such leadership. Organizational leaders are very familiar with what it takes to effectively lead within an organization, but most have little or no experience with exercising leadership across sectors and within systems that lack clear lines of authority and established rules and procedures.

But there's hope. Many organizational leaders, after being introduced to the concepts of complex civic systems, are able to adapt their leadership styles to this different environment and can effectively engage others to join in the collaboration. Funders can encourage leaders to take the risk of exercising galvanizing leadership by assuring leaders they are prepared to support a collaboration process if the leader is able to engage others.

Philanthropic leaders can also directly exercise galvanizing leadership. Indeed, of all of the leaders within a community, philanthropic leaders have the greatest freedom to exercise galvanizing leadership. Leaders from other sectors have significant organizational/institutional constraints (public officials must focus first on serving their constituents, for example) that can limit their ability to cross boundaries and engage others from multiple sectors. Philanthropic leaders face few such constraints and often have the kind of credibility and trust that is necessary to help persuade others the time is right to turn the cause that has garnered many complaints over the years into a compelling cause.

*“When leaders step beyond the interests of their own organizations and persistently and consistently advocate for improved outcomes within a complex system, galvanizing leadership is present.”*

Collaboration requires organizations (and the individuals who work within them) to cross boundaries, take risks and change their behavior. In short, collaboration is hard work. Asking poor-performing organizations (organizations that are unable to produce valued outcomes either because of a lack of resources or effectiveness) to collaborate is doomed to generate “coblaboration.”

One of the shared understandings that emerged from the learning process catalyzed by Ireland and Samuel was that our region's entrepreneurial assistance organizations weren't producing valued outcomes. Several organizations within the entrepreneurship system touted awards received from third parties, but entrepreneurship outcomes were few and far between. By one ranking, greater Cleveland was dead last in the nation in entrepreneurship outcomes. If entrepreneurial outcomes were to improve, the organizations within the entrepreneurship system needed to improve their performance, too. Efforts by the state, our Fund and our members to establish clear goals and common measures of performance by the entrepreneurship organizations within the system were critical pre-cursors to the high levels of collaboration now so evident in our region's entrepreneurship system.

### **What are the characteristics of a high-performing organization?**

While there are many definitions of high-performing organizations, we have found that the Performance Imperative advocated by the Leap Ambassadors Community and others provides a good framework for understanding the types of organizations that are well-positioned to participate in cross-sector collaborations. By this frame, high-performing organizations have:

- (1) courageous, adaptive executive and board leadership;
- (2) disciplined, people-focused management;
- (3) well-designed and well-implemented programs and strategies;
- (4) financial health and sustainability;
- (5) a culture that values learning;
- (6) internal monitoring for continuous improvement; and
- (7) external evaluation for mission effectiveness.

In short, high-performing organizations have the leadership necessary to stay focused on generating meaningful, measurable outcomes and to adapt to change.

## What can we do to create more high-performing organizations?

Advocates of collaboration need to both expect and demand high performance from those they want to engage in the collaboration process. For funders, this requires engaging with organizations to develop effective ways to measure outcomes and a willingness to provide sufficient resources so that the organizations can be effective. Like Eric Gordon of CMSD, Mario Morino, chairman of the Morino Institute, and champion of the Performance Imperative, laments the inability of most collaborations to generate anything more than more meetings. He correctly emphasizes that the first step toward enduring, positive change is to have funders, board members and organizational leaders embrace the pillars of the Performance Imperative and its definition of high performance: “High performance is the ability to deliver—over a prolonged period of time—meaningful, measurable and financially sustainable results for the people or causes the organization is in existence to serve.”

### PRECONDITIONS CHECKLIST



#### Compelling Cause

- There is a compelling cause to be addressed by stakeholders. (Have stakeholders tried to address this cause in the past?)
- Evidence that stakeholders, including funders, are compelled to change their behavior.
- Stakeholders unlikely to change their behavior have been identified.
- Funders are prepared to change their behavior.

#### Galvanizing Leadership

- Evidence that galvanizing leadership is being exercised.
- Stakeholders have identified who they are willing to follow.
- One or more stakeholders have exercised galvanizing leadership in the past.

#### High-performing Organizations

- One or more organizations within the system are recognized by funders and constituents as high performers.
- One or more organizations within the system are prepared to make the changes necessary to become a high performer.
- Funders within the system support and expect high performance.



## CAPACITY

## PROCESS

## LEADERSHIP

# ELEMENTS OF EFFECTIVE COLLABORATION

Even if the conditions are right for collaboration to occur, success of the collaboration process is not guaranteed. Effective collaborations all have three common elements: capacity, process and leadership.

A collaboration must have the capacity to perform vital functions that enable it to survive and thrive; it must establish a clear process for how the partners interact with one another over the life of the collaboration; and it must ultimately be supported by a strong, collaborative leader, which demands a different set of skills from that of an organizational leader.

Underlying all of these essential elements is the need for trust among collaborators.

*“Trust is critical to effective collaboration because organizations participating in a collaboration are taking a risk. . . . We are much more willing to take risks with those we trust.”*

When a handful of foundations in Northeast Ohio first began talking in 2003 about working together to support economic initiatives that could advance growth and opportunity (the genesis of our Fund), they didn't know exactly what they'd do together. But they did know a lot of work had to be done if they were going to work together. Meetings needed to be scheduled. Research needed to be completed. Evaluations needed to be conducted. Outcomes needed to be measured. Communications needed to go out to all of the partners in the collaboration. They had to communicate with others about what was being done, and advocate for others to join in support of the work.

These are just a few of the vital functions to be performed by every collaboration. Who performs these functions, and how they are performed, is critical to the success of any collaboration.

When our Fund started, there was no independent, dedicated staff. Our member organizations assigned staff or board members (collectively referred to as "loaned staff") to help organize the initial work of our Fund. As the scope of that work clarified and grew, a staff person was retained to help coordinate the interactions of the members, but loaned staff continued to oversee the primary functions of our Fund, including evaluating potential grantees.

Fund members valued that the "collaboration functions" were being performed by the partners in the collaboration.

Most of the members assumed some responsibility for assisting with key functions, and the shared responsibility reinforced that the Fund was a collective effort not controlled by any one member. As Fund members worked together, their mutual trust grew. Trust is critical to effective collaboration because organizations participating in a collaboration are taking a risk. Collaborations are risky in part because they aren't controllable in the same way an organization can control a new project. Collaborations depend on independent players agreeing to work together. We are much more willing to take risks with those we trust.

At the same time our Fund was building trust, members of the loaned staff were suffering from fatigue. Loaned staffers took on the functions within the Fund in addition to their day jobs. They sustained this "double duty" for more than three years.

*"Collaborations depend on independent players agreeing to work together."*





*“Backbone functions are often behind the scenes and not visible, but they are vital to a successful collaboration.”*

When Fund members committed to working together beyond the initial three-year phase, they knew the collaboration needed dedicated staff to assume responsibility for performing the vital collaboration functions. Because of the strong trust members had built, bringing in “outside staff” wasn’t seen as a threat to the culture of the collaboration. Members knew *they* were the Fund, and would continue to lead and direct the collaboration process.

Our Fund had to identify and address the value and challenges of “collaboration capacity,” as does every collaboration. FSG, the global consulting firm credited with developing the “Collective Impact” framework for cross-sector collaboration, uses the term “backbone” to describe the critical functions that need to be performed to manage the collaboration process. “Backbone” is an apt analogy because a backbone doesn’t have any arms or legs, but those arms and legs cannot function without a backbone. Backbone functions are often behind the scenes and not visible, but they are vital to a successful collaboration.

**Critical “Backbone” Functions:** Critical functions that need to be performed to build and sustain a cross-sector collaboration include, but are not limited to:

- facilitating shared learning among partners within a collaboration;
- communicating with partners and other players with influence over the system;
- convening and facilitating meetings among partners within the collaboration;
- facilitating the development of a common agenda and shared goals by partners;
- coordinating mutually reinforcing activities among partners;
- catalyzing pilots and demonstration projects with partners;
- engaging partners to identify shared measurements;
- measuring and communicating performance; and
- advocating for resources for the collaboration, as well as for the collaboration’s partners.

### **The Importance of Data**

The degree to which each of these functions need to be performed will vary widely, but all effective collaborations have robust measurement systems. Data help partners challenge assumptions and past practices, and stay focused on the goal of the collaboration.



Data help us to simplify the complexity of the systems in which we are trying to achieve change, and inform us as to whether we are making progress. Our Fund, for example, used a rigorous analysis of economic outcomes in regions across the country (“What Matters to Metros”) to better understand the key factors that advance Growth & Opportunity. Such foundational data help us better understand the context, performance and potential of the complex system, and identify strategies to catalyze positive change.

Data are also used to measure the level of change being achieved. When all partners measure change similarly, the collaboration is more likely to be sustained. All of the partners in the JumpStart Entrepreneurial Network, for example, measure outcomes using a standard set of criteria required by the state of Ohio’s Third Frontier program. The partners agree to this shared measurement in exchange for access to Third Frontier dollars. This is just one example of the critical role funders can play in setting the rules of interaction within a collaboration. Of course, most individual funders don’t have sufficient resources to force data compliance. However, a group of aligned funders can encourage a collaboration to develop shared data.

.....

*“To build trust among the partners of a collaboration, data should be used as a flashlight, not a hammer.”*

.....

Partners are more likely to embrace common measures and other forms of shared data if they are confident the data will be used to help them improve their performance rather than limit resources or embarrass them publicly. For example, a collaboration supported by several of our members in Summit County, called the Summit Education Initiative (SEI), secured data sharing agreements with all of the county’s public school districts because it promised the data wouldn’t be used to compare districts against each other. To build trust among the partners of a collaboration, data should be used as a flashlight, not a hammer.

Organizations that only perform these collaboration functions (sometimes called “backbone organizations”) are unusual entities. They don’t provide direct services; rather, they perform functions that improve the quality of the services provided. For example, ConxusNEO, a backbone entity that the Fund helped create to improve talent development outcomes for Summit County, doesn’t provide any workforce training programs. Instead, it uses data to communicate employers’ talent needs to educators and others who run workforce training programs.

***“Backbone organizations don’t provide direct services. They perform functions that improve the quality of the services provided.”***

Sometimes organizations are asked to perform collaboration functions and to provide direct services, as well. This is the case for JumpStart, which was formed in 2004 to provide financial and other assistance to high-growth potential startups in Northeast Ohio. JumpStart was a key entity in the revitalization of the region’s efforts to support entrepreneurs described earlier in the section on galvanizing leadership. But it wasn’t the only entity providing services to startups. More than a dozen entrepreneurial assistance organizations in the region received some form of state funding, and in 2008 the state of Ohio made an important change. It decided that all of the entities should report outcomes using similar metrics, and it charged JumpStart with the responsibility to track those outcomes, as well as convene and facilitate communication among the entities. JumpStart had to transition from being an entity that provided direct services, to one that also provided some “backbone functions.”

If an existing provider of direct services is tasked with providing backbone services, the distinction between those roles should be made as clear as possible to the partners within the collaboration.

**Ideally, the partners in the collaboration identify what functions need to be performed and agree on:**

- who will perform each function;
- how to allocate resources to perform each function; and
- how to measure the value of each function.

Of course the ideal is rarely, if ever, achieved. More often, advocates of a collaboration (particularly the funders) identify the need for backbone functions and select an organization to perform them. In these instances, the backbone is being inserted into a system. Like a body's reaction to an organ transplant, it's not uncommon for players within a system to reject an inserted backbone. This rejection can have many causes. For example, stakeholders may not value the backbone functions as much as the advocates of collaboration. They may view the backbone as competition for funding or as a distraction from their own mission. The natural tension between the backbone and the collaboration partners needs to be managed proactively. This tension is one reason why the staff and leadership of an organization performing backbone functions requires distinct behaviors and skills from those needed to succeed within a traditional organization.

Staff members within a traditional organization know who they work for, and there are clearly established rules and procedures that govern how things get done. Staff of an organization performing backbone functions works on behalf of the collaboration, and each member of the collaboration likely has a slightly different set of expectations for how things get done.

Managing a collaboration is significantly different from managing an organization, and that difference extends to the board of directors, as well. If an organization is tasked with providing a large portion of the backbone functions within a collaboration, then the board of that organization needs to develop a clear understanding of the unusual roles that backbones play within complex systems.

.....

*“Like a body’s reaction to an organ transplant, it’s not uncommon for players within a system to reject an inserted backbone.”*

.....

## BACKBONE STAFF NEEDS TO BE:

<b>Purpose-driven</b>	The purpose of the backbone is not to strengthen the organization, but to improve the outcomes of the system.
<b>Trustworthy</b>	Partners will not assume shared responsibility with those they don't trust.
<b>Humble</b>	The outcomes matter more than praise or credit.
<b>Intentional</b>	Collaboration doesn't just happen, it takes planning and focus.
<b>Weavers of relationships</b>	Trust needs to be built <i>among</i> partners, not just between the backbone and individual partners.
<b>Aggregators, synthesizers and sharers of knowledge</b>	Partners need a shared understanding of the system and what change is possible.
<b>Discerning of diverse interests</b>	Staff needs to help align those interests around a shared goal.
<b>Project managers</b>	Collaboration demands the development, implementation and evaluation of complicated and iterative efforts.
<b>Engaged with diverse populations</b>	No two partners are alike.
<b>Willing to challenge status quo</b>	The goal is change, but some players will want to preserve the status quo. Staff needs to keep the focus on the goal.
<b>Good communicators</b>	Constant, consistent communication is needed to sustain alignment and support of the backbone.

Board members of backbones need to assume roles and responsibilities beyond those of a board member of a traditional nonprofit. Traditional organizations are only responsible for their organization's outcomes. Therefore, their boards appropriately focus on their fiduciary, strategic, governance, and development responsibilities to the organization. **Board members of backbones must perform those same roles, as well as:**

DEVELOP  
A SYSTEMS  
VIEW

ADVANCE SHARED  
RESPONSIBILITY

CREATE A  
COLLABORATIVE  
ENVIRONMENT

A systems view enables board members to understand the roles the backbone will need to play to catalyze the actions that will achieve the collaboration's goals. For example, the board of a backbone organization responsible for coordinating a collective effort to improve educational outcomes needs to understand the motivations and priorities of key stakeholders. It is not enough to know the operational needs of the backbone. Board members need a strong understanding of the entire system they are striving to improve.

This is an added burden for board members, and one reason why board members of backbone organizations need to be chosen with great care. It is common for existing nonprofits to be tapped to play backbone functions. However, it isn't always common that board members of those entities fully understand these new roles and responsibilities.

Backbone organizations facilitate and coordinate change; however, they cannot order change. For a collaboration to be successful, the individual participants within the collaboration need to assume shared responsibility for achieving the goals of the common agenda. Backbone staff is charged with building trust among stakeholders to promote this shared responsibility. But the influence of backbone staff is limited within complex civic systems, which are made up of independent (and often powerful) organizations.

One staff member of a backbone entity supported by our Fund recently shared that her organization's CEO is skilled at running "trick plays" that persuade others to engage in the collaboration process. But she warned that trick plays can only work for so long and soon he'll need an "offensive line" that pushes for more sustained collaboration. That offensive line is the backbone's board of directors—a group of prominent civic leaders with the standing to insist that the goals of the common agenda take precedence over the parochial interests of individual organizations. To be the "offensive line," board members must assume shared responsibility for exercising leadership and influence across the system and keeping the focus on the collective goals. Of course, this requires the backbone to identify potential board members with the ability to advance shared responsibility across the system.

Organizations that are tasked with performing collaboration functions should always consider how those functions are valued by other partners in the collaboration. They need to avoid the temptation of creating programs that are viewed as competitors for funding or influence. The backbone's board must stay focused on the needs of the collaboration, and what is necessary to achieve the desired change.

Board members need to understand and value the backbone's role of catalyzing the act of collaboration itself. Then they need to make sure the backbone's activities, as well as their own activities as board members, strengthen the climate for collaboration.

Because of the distinct roles played by backbone organizations, board members cannot treat their responsibilities as "just another board seat." Advocates of cross-sector collaboration need to work with the leaders of backbone organizations and help them prepare their board members to play these distinct roles. These additional roles and responsibilities should be clearly articulated within any onboarding process used for new board members. And the board should regularly review how each board member is performing these roles and assuming these responsibilities.

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*“Perhaps the biggest challenge for any backbone organization is creating an environment where the functions it performs are valued by others within the collaboration.”*

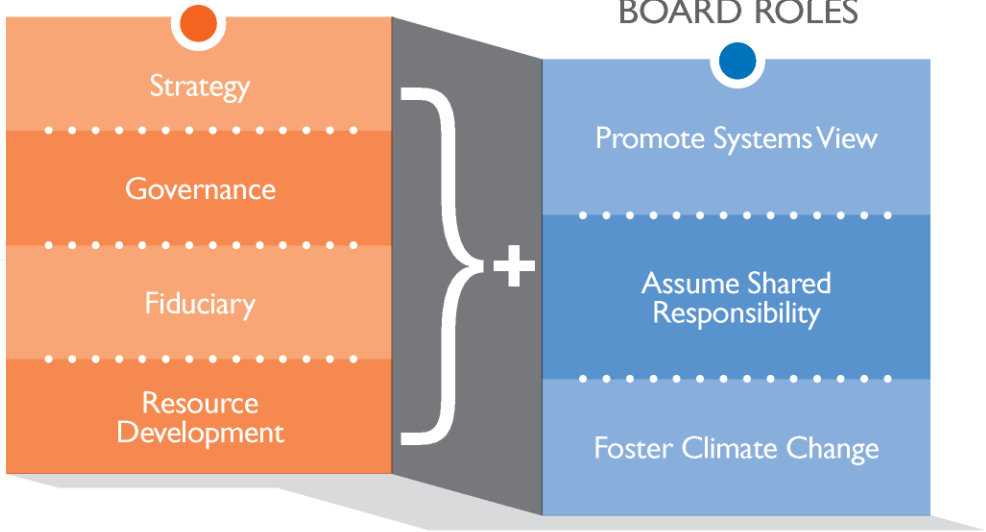
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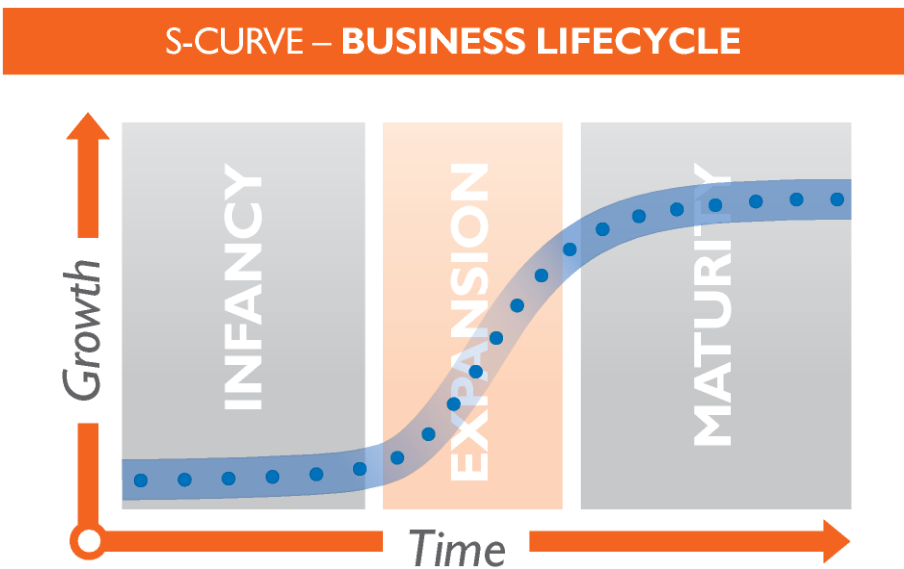
## ORGANIZATION BOARD ROLES



## BACKBONE BOARD ROLES



While the ultimate goal of the collaboration is improved outcomes, the management of the collaboration process is focused on how well the partners interact with each other as they journey through the “collaboration cycle.” Staff and leadership of traditional organizations are accustomed to managing through the standard performance curve of an organization’s lifecycle.



Managing the performance of a collaboration requires leadership and staff to understand the collaboration cycle, which is markedly different from a business lifecycle. The collaboration cycle is more of an infinity loop than an S curve.

### **Collaboration Cycle**

Researchers at the Plexus Institute, Mark Cabaj with the Tamarack Institute, and other social scientists who have studied collaboration have found that cross-sector collaborations go through a similar cycle during a three- to five-year period. It is helpful to draw the cycle as an infinity loop because it is a continuous, repeating process. It is even more helpful to share the cycle with everyone who is engaged in the collaboration process.



This cycle serves as a roadmap for the diverse players who are along for the collaboration journey. It is invaluable to new participants joining an existing collaboration, as it can be used to help them understand where the partners are on the journey. Advocates of collaborations, particularly those performing the key collaboration functions, also should take the time to help each partner assess where they are on the cycle. Not every partner travels through the cycle at the same pace.

**The collaboration cycle has four phases:**

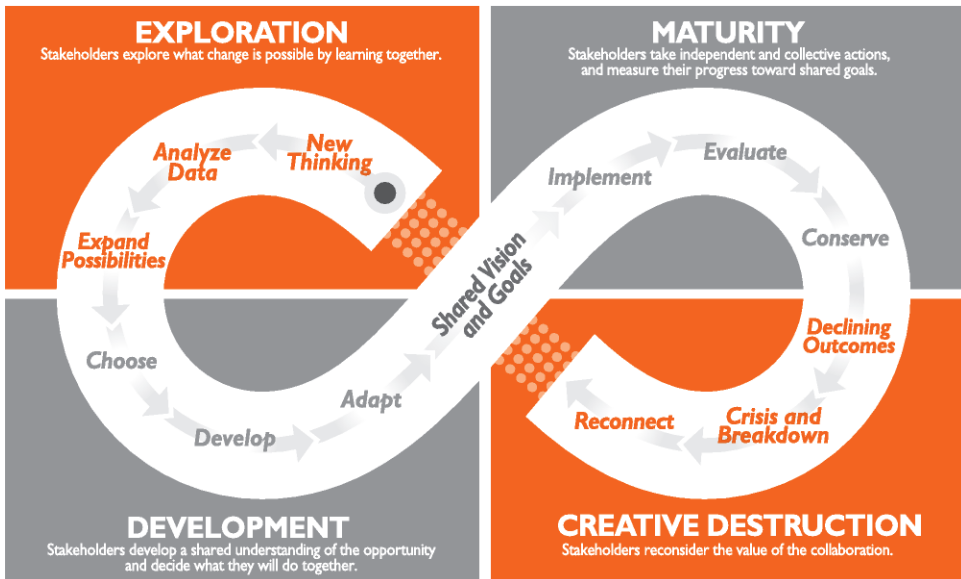
**EXPLORATION:** Partners go through a shared learning process that builds a shared understanding of the root causes of challenges and what change might be possible.

**DEVELOPMENT:** Partners identify the areas within the complex system where they want to first catalyze change, develop a shared vision and goals, and agree to a framework for how they will work together in the future.

**MATURITY:** Partners take actions together and separately to achieve shared goals, progress is measured, and adjustments are made.

**CREATIVE DESTRUCTION:** Partners in the collaboration re-evaluate whether the outcomes merit the resources invested and the cycle resumes with an exploration of what's working, what's possible, and whether the collaboration can be sustained.

# COLLABORATION CYCLE



Source: Inspired by the work of Plexus Institute and Tamarack Institute

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*“Once partners begin to take action together, the need for communication and data sharing will increase dramatically. Partners will need to understand each other’s roles and how they can help one another.”*

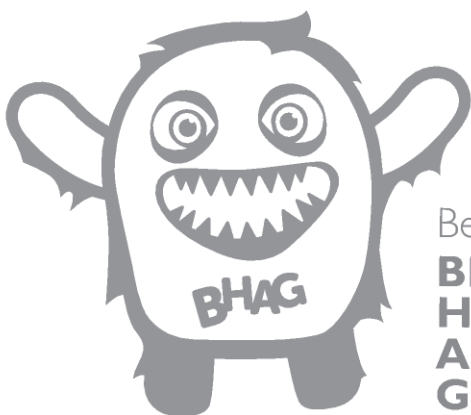
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In the middle of the collaboration cycle are the shared vision and goals that hold the collaboration together. In the Collective Impact framework developed by FSG, this is called the “Common Agenda.” Without this shared vision for change, the collaboration will never succeed. Often, some partners enter the collaboration process with a shared understanding of the vision and goals, and others do not. Advocates of collaboration need to assure all of the partners develop and maintain this shared understanding throughout the collaboration process. It is through the development of a shared vision and goals—and the accompanying commitment by partners to assume shared responsibility for achieving that vision and those goals—that the partners begin to form a structure to coordinate and align their efforts. This structure is much more of a network (partner peers connected to each other) than a traditional organizational structure.

As partners form a network that enables them to move from exploring what they will do together to actually working together, they will likely need to reassess the rules of interaction and the critical collaboration functions that need to be performed. For example, once partners begin to take action together, the need for communication and data sharing will increase dramatically. Partners will need to understand each other’s roles and how they can help one another.

This ramp up of activity can often overwhelm the organizers and coordinators of the collaboration. The transition from planning to doing is dramatic. It’s not uncommon for collaborations to have more than one shared goal, so participants should be prepared to transition into action in one area while still refining the shared goals in another.

Keeping all of the partners informed and comfortable with where they are within the collaboration cycle is vital. Each meeting of the partners should begin with a review of the shared vision and goals. This is important, in part, because the vision and goals will change over time. For example, early in the collaboration process the goal may be to develop a shared vision. Once that vision is set, revised goals associated with the change they want to achieve will be needed..



Beware of  
**BIG,  
HAIRY  
AUDACIOUS  
GOALS!**

A common mistake early in the collaboration cycle occurs when participants confuse metrics with goals. Goals come first. For example, the Fund supports a collaboration that is working to support high-growth potential entrepreneurs. The goal of the collaboration is to increase the amount and diversity of capital available to these entrepreneurs. The metric used to measure progress toward that goal is the amount of venture capital raised within the region. Partners should clearly define the goal before they choose a metric to measure progress.

Collaborations often start with an aspirational goal, sometimes referred to as a **BHAG (Big, Hairy Audacious Goal)**, that can unite the participants. For example, during the development of Northeast Ohio's economic competitiveness strategy, participants established the aspirational goal of having our region's economy grow faster than the national economy. The challenge posed by a BHAG is it may take a decade or more to achieve. Change needs to be evident much more quickly for partners to sustain their shared commitment to the collaboration process.

Aspirational goals need to be paired with **SMART goals (Specific, Measurable, Achievable, Relevant, and Time-bound)**. Team NEO, the nonprofit charged with coordinating Northeast Ohio's implementation of its regional economic competitiveness strategy, is working with its partners to define more specific, time-bound goals. As our colleagues from Living Cities and other advocates of cross-sector collaboration have noted, the aspirational goals can often be in tension with the achievable goals. Indeed, Team NEO has learned that the aggregate goals of its partners don't put the region on a path toward the aspirational goal of outperforming the national economy. Balancing that tension—and sometimes working with partners to redefine both kinds of goals—is critical to sustaining a collaboration through the cycle.

Choosing the right metrics to measure progress toward goals is also critical. Experience teaches us that if the partners don't see the "needle move" within six months they can lose faith in the collaboration process. Not every metric needs to move so quickly. But some do to reinforce the value, promise or even the gravity of the collaboration (as sometimes the needle moves in the wrong direction). Metrics should be easily communicated to help partners and others within the system understand the change that is occurring.

It is easy for partners, including funders, to understand measures such as the number of jobseekers placed in jobs or the amount of venture dollars raised. These signs of progress can easily rally more support for the collaboration from stakeholders who've yet to commit to being partners, or from others, such as the media. It is much more challenging to communicate more process-oriented metrics, such as the number of jobseekers who have successfully completed a testing program.

# COLLABORATION TRAPS

Unavoidable elements of the collaboration process

## SCARCITY

Capacity and resources are insufficient as partners struggle to garner community support for each of their individual efforts.

**CHALLENGES:** Efforts to generate resources for the collaboration are viewed as a threat by individual partners; momentum cannot be sustained.



## RIGIDITY

Partners struggle to adapt to changes within the system.

**CHALLENGES:** Partners cling to past; fear uncertainty; resist change or perception of failure.

Such metrics may be critical to assessing the progress of a collaboration, but extra effort will be required so that partners value the change that is being measured.

Highlighting the change that is being achieved throughout the collaboration cycle is essential. Coordinators of a collaboration shouldn't assume that all partners see or value the change, and partners need to see and value the change if they are going to stick with the collaboration. Eventually, the collaboration will fall into one of many traps and the partners will need very clear reasons to get through these challenges.

"Collaboration traps" are unavoidable elements of the collaboration process. These traps aren't optional; every collaboration our Fund has supported has experienced them. The following graphic highlights the most common types of traps experienced by collaborations.

## PARASITIC

Partners are overly dependent on the backbone or host of the collaboration, and the host grows weary of "parasites."

**CHALLENGES:** Host cannot sustain responsibility for collaboration over extended period.

## CHRONIC DISASTER

Partners are "spinning," unable to sustain positive change, and begin to question value of the process.

**CHALLENGES:** Weak trust among stakeholders limits ability to deal with volatile environment. Divergent views of vision and goals.

## Rules of Interaction

How well the partners journey through the collaboration cycle is greatly dependent on how the partners within the collaboration function with each other and those who perform these functions.

Within organizations, the rules of interaction among staff, leadership and the board are often clearly defined through organizational charts, policies and culture. Because collaborations are made up of independent players operating within complex systems, there is no organizational chart, nor are there established policies, processes or procedures.

Chaos and disorder can easily emerge when there are no accepted norms of behavior; so successful collaborations quickly establish them. Sometimes these norms are self-imposed based on a common understanding of what is expected and necessary; they are implicit rules. Over time, the collaboration may find it needs explicit rules to more clearly direct behavior, particularly to assist new players as they begin to engage with the collaboration.

**The rules of interaction may vary widely from one collaboration to the next, but they should promote:**

### INCLUSION

Civic systems are made up of numerous, diverse players from multiple sectors. The sheer number of players who could be invited to the collaboration table can be overwhelming. Experience teaches us that it is easier to manage smaller, rather than larger, groups. But the goal isn't to manage the group; the goal is to achieve enduring positive change. Advocates of collaboration don't need to invite everyone to the table right away, but the table needs to be designed so that more players can join in as the goals of the collaboration crystallize.

When the Fund first engaged with other players interested in a cross-sector collaboration to improve the talent development system in Summit County, rules were established that limited the number of players who participated in a shared learning process. But throughout the learning process, other players were informed of the work, and as the work ahead clarified, more players became engaged. Among those who need to be included in the collaboration process are those with the "lived experience." For example, the Summit talent collaboration engaged jobseekers and companies in the process. Their input and participation helped remind the other players of the "compelling cause."

*“Chaos and disorder can easily emerge when there are no accepted norms of behavior.”*

## RESPECT .....

Simply being invited to the table doesn't mean one is heard or has influence. Each player willing to assume shared responsibility for the outcomes of the collaboration deserves to be respected. If players perceive their contributions aren't valued by other players, they will step away from the collaboration process. Invariably, players with less organizational standing or financial resources feel they have less influence over a collaboration. Rules and norms of behavior can be established that maximize the respect shown to all participants. For example, our Fund created the “one member, one vote” rule to make sure the largest financial contributors didn't get more voting power than any other member.

## ..... IMPROVEMENT

Each organization needs to look out for its own best interest. This is one reason why collaboration among diverse organizations is so challenging. But if each meeting of the partners within a collaboration is focused on making sure each organization “gets theirs,” it is unlikely change will occur. Rules and norms of behavior can be established to encourage partners to stay focused on improving the outcomes at the systems level. Rules about how the collaboration will measure and report outcomes are critical to sustaining participation.

Advocates of collaboration need to take time to explore and develop the rules of interaction that will guide their collaboration process. These rules of interaction will need to be revisited regularly—both to remind partners of how they are supposed to behave and to consider whether they need to be changed.

Successful collaborations are made up of partners focused on maximizing their contribution to the system's outcomes, not credit or turf. This focus on outcomes needs to extend to the collaboration process itself. Because collaboration requires significant time, energy and resources, the improved outcomes generated need to be substantial to justify the cost. If, for example, entrepreneurial assistance organizations can independently serve nearly

as many entrepreneurs as they could working together in a collaboration, then promoters of collaboration should seriously consider the value of their approach. And, of course, if partners are more focused on taking credit and building empires than they are on catalyzing enduring positive change, then the collaboration won't survive the first trip through the collaboration cycle.

To sustain a collaboration, members of the backbone staff and others should highlight and celebrate the contributions of partners so their peers and other stakeholders are aware of the role they are playing to advance change. Backbone staff and champions of the collaboration also need to be prepared to manage conflicts that will invariably occur among partners who fall into the habit of taking credit to the detriment of the collaboration. Managing this conflict requires leadership.

## TESTIMONIAL



*“Collaboration has been at the heart of most successful endeavors since the beginning of time. We’re grateful to Chris and the Fund for creating this reference piece and for helping organizations here in greater Akron and Summit County strengthen our collaborative efforts for the benefit of our citizens.”*

**John T. Petures, Jr.**

President and CEO | Akron Community Foundation



Leadership is often associated with positional authority and control. But the absence of positional authority in complex, civic systems doesn't make leadership less relevant, it makes it more necessary than ever. Without leadership, the independent players within a system will focus on their own individual priorities, and not identify or address the broader priorities of the community. Without leadership, the status quo will persist.

Guiding a diverse set of partners through the collaboration cycle and its inherent traps requires the exercise of collaborative leadership. As authors David D. Chrislip and Carl E. Larson highlight in *Collaborative Leadership*, this type of leadership builds a “constituency for change” rather than using positional authority to push for change.

Collaborative leadership operates in tandem with the galvanizing leadership described earlier. Galvanizing leadership is often exercised in very public ways by prominent individuals working to influence their peers to unite behind a compelling cause. In contrast, collaborative leadership is often exercised behind the scenes to sustain the collaboration process. Key partners within the collaboration exercise this leadership when they focus more on their organization's contribution to the cause than on taking credit for the change. And the staff charged with facilitating the collaboration process—the backbone staff—must be particularly adept at this kind of leadership. Given collaborative leadership's importance, the next section is devoted to taking a deeper dive into what it is and how to exercise it.

*“The absence of positional authority in complex, civic systems doesn't make leadership less relevant, it makes it more necessary than ever.”*



## ASSESSING CONTEXT

## INQUIRY

## BUILDING TRUST

# DIVING DEEPER INTO COLLABORATIVE LEADERSHIP

Effective collaborative leaders encourage partners within a collaboration to assume more shared responsibility for achieving the common goal. To do this, these leaders develop an understanding of the priorities and motivations of different partners, identify opportunities for mutual benefit, and bring valued resources (ranging from data to dollars) to the collaboration.

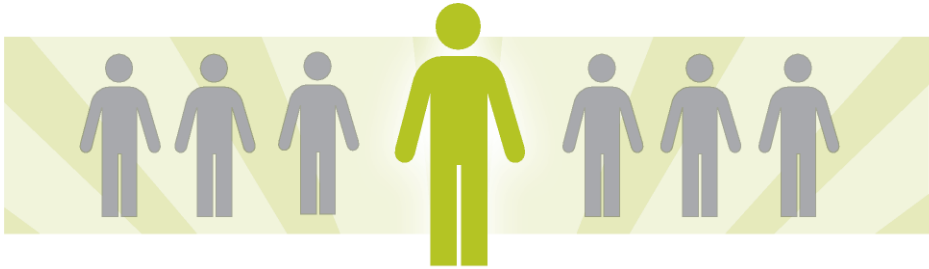
Backbone staff may need to overcome an understandable level of suspicion that partners may feel for the collaboration process. After all, one role of the backbone is to bring more transparency and accountability to a complex, civic system. And it is normal for some partners to feel threatened by an outside effort to hold their organization accountable.

The leader of the backbone must be able to persuade skeptical partners that there is value in working through the challenging collaboration process. Producing value for a diverse set of partners, some with competing interests, is no easy task and requires a distinct skill set captured in the job description on the following page.

*“[Collaborative leaders build] a ‘constituency for change’ rather than using positional authority to push for change.”*

# WANTED

## NETWORK LEADER



.....

*“An emerging collaboration designed to bring enduring positive change to a complex, civic system seeks a visionary, focused, humble, and results-oriented leader who has experience uniting diverse interests to achieve shared goals.”*

.....

### **Candidates should demonstrate an ability to:**

- Assess the context within a complex, civic system, including the priorities and motivations of diverse stakeholders.
- Use inquiry to help stakeholders identify the change that is possible.
- Build trust among diverse stakeholders so they are willing to assume shared responsibility for achieving that change.

### **Candidates should have experience:**

- Engaging and communicating with diverse audiences, ranging from high-level civic leaders to residents living in distress.
- Building commitment among those diverse audiences to achieve change.
- Exercising influence in environments where they have no authority.
- Managing multiple projects simultaneously, from conception through evaluation.
- Collecting and synthesizing data from multiple sources, and helping diverse stakeholders use that data to identify and take action.
- Securing financial resources from private, public and philanthropic sources.
- Advocating for change.

### **Candidates should be comfortable:**

- Serving multiple partners.
- Leading in environments without established policies, procedures and rules.
- Navigating fluid power dynamics.
- Operating in a rapidly evolving environment.
- Leading from behind.
- Allowing others to take credit.

Of course, finding a candidate with these skills, experiences and characteristics is not easy. Many effective leaders of traditional organizations, for example, don't fit the bill. They are accustomed to clear lines of authority and organizational structures. Leaders of a collaboration must be credible and dynamic, yet if they are seen as too assertive, other stakeholders may become threatened and decline to engage. Those responsible for hiring a collaboration leader must themselves have a good understanding of the context within the system so they can identify the candidate with the right skills and characteristics for the job.

Backbone leaders also need to take care in hiring staff members who recognize and can operate in environments where trust is critical and their influence is limited. In a normal organization, a project manager has some level of authority over those who are responsible for performing specific project tasks or functions. But a project manager working for a backbone has no authority and very limited influence over the independent organizations that are collaborating. For example, in the early days of the ConxusNEO collaboration in Summit County, representatives of a key collaboration partner failed to attend critical planning meetings. In a normal organizational setting, the lines of authority to address such behavior are clear. In a collaboration setting, the project manager has to delicately assess what actions he/she can take to try to influence future behavior of a staff member working within a completely separate bureaucracy.

To better understand what it takes to exercise effective collaborative leadership, our Fund worked closely with Leadership Akron and the Cleveland Leadership Center. Both organizations share our belief that collaborative leadership is essential to catalyzing enduring, positive change in our communities, and make it a core theme of their respective leadership development programs. Both established and emerging organizational leaders benefit greatly when they get to see firsthand how collaborative leadership differs from organizational leadership through experiential learning offered by these leadership programs.

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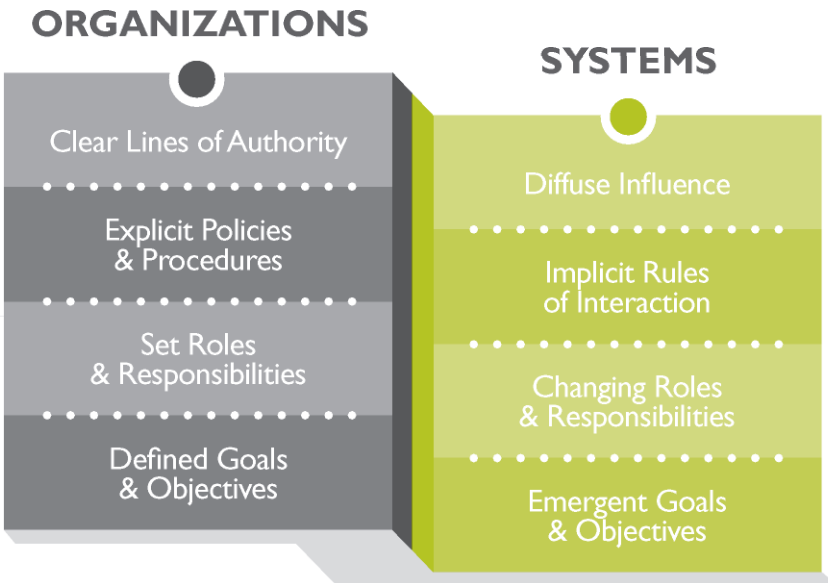
*“Leaders of a collaboration must be credible and dynamic, yet if they are seen as too assertive, other stakeholders may become threatened and decline to engage.”*

.....

Within organizations there are well established rules and procedures that guide how things get done. Nothing is as clear within a collaboration. Within a collaboration, such rules and procedures emerge and evolve through interactions among the players who have assumed shared responsibility for achieving a shared goal. To help organizational leaders adapt to the challenges of working within a collaboration, our Fund worked with our leadership program partners to identify specific skills that leaders could develop to better exercise collaborative leadership. We designed a workshop to provide organizational leaders a safe place to practice those three skills: (1) assessing context; (2) inquiry; and (3) building trust.

## I ASSESSING CONTEXT | INQUIRY | BUILDING TRUST

Leaders need to understand the elements, relationships, environment, and other factors that shape the context of the complex system in which the collaboration is operating. The most fundamental aspect of assessing context is understanding (and helping others understand) how organizations differ from complex systems.



We are accustomed to assessing the strengths and weaknesses of organizations, in part because we all work for an organization and we've been well-trained in organizational structures. Few organizational leaders have any training at all in assessing complex systems. A first step to assessing the performance of a complex system is to identify its key priorities.

For example, one of the key priorities in the entrepreneurship system is access to capital. Once the priorities are identified, then the key functions and actions that need to be performed to address that priority can be listed, as can the organizations and institutions that are responsible for performing them. As these priorities, functions and organizations are listed, they can be plotted

to develop a "systems map." Such maps can show the inter-relationships among key players in the system, and can help leaders identify where the system has strong connections and where there are gaps. Developing the ability to illustrate and helping others see the system is important, as no one works for a complex

*“Collaborative leaders develop a strong understanding of the priorities and motivations of others...”*

system. Everyone involved in the system works for an organization and they need help seeing the system as a whole. Systems maps can help stakeholders understand what change is possible and how different stakeholders might have to alter their actions and relationships to achieve that change.

Collaborative leadership also assesses how other stakeholders are viewing the collaboration process. Collaborative leaders develop a strong understanding of the priorities and motivations of others, and then use that information to build greater alignment among the partners, and to help the partners better define the boundaries of the system they are striving to change.

**Different from the preconditions for collaboration, the following key contextual factors of collaboration may be assessed by a collaborative leader throughout the process:**

## CLIMATE FOR COLLABORATION

Does the community have a history of collaboration or is turf protection a core competency among key players? Even when players assume shared responsibility for achieving a shared goal, the climate may not be right for collaboration simply because the players have never done it before. Collaboration is demanding, challenging work. Collaborative leadership helps change the climate for collaboration.

## ..... CHUNKINESS

Complex systems don't change all at once. Critics and skeptics of collaboration are correct to point out that bringing change to complex systems is akin to boiling the ocean. Conceivable, but not achievable. Systems change is achievable, but only if the work is broken up into chunks. By assessing the context of the system, we can identify what chunks of the system might be most ready for change.

For example, the overall goal of ConxusNEO, the talent development backbone entity our Fund has supported in Summit County, is to build a world-class, demand-driven talent system there. But where to start? Leadership assessed data and the priorities of key stakeholders, then decided to initially pursue an effort to improve the Akron Public Schools' ability to increase the number of students considering a career in manufacturing. That's the first chunk that ConxusNEO took on. To be worth the time and effort, a system chunk needs to be manageable, measurable and meaningful.

## CAPACITY .....

As noted earlier, collaboration requires capacity. Leaders assess whether there is capacity (and where there are gaps) to facilitate and coordinate the collaboration process within the existing system.



### TOOLS

**Techniques to strengthen ability to assess context include:**

- Map the complex, civic system you want to change by illustrating the existing relationships among the organizations and entities that perform the key functions and activities that need to be performed within the system.
- Map how the system would need to look to produce outstanding outcomes.
- Measure the climate for collaboration by assessing the turf protection tendencies of key organizations.

Collaborative leaders use inquiry to understand the motivations and priorities of other stakeholders within the system. While there are many ways to embed inquiry into a collaboration process, leaders need to be able to develop and persistently ask compelling questions. Compelling questions prompt conversations that help us improve our decision-making, create learning opportunities, direct our focus, engage others, influence our thinking, and ultimately build trust among stakeholders.

**Marcy Levy Shankman, formerly with the Cleveland Leadership Center, identified three kinds of compelling questions that help create and sustain shared understanding throughout the collaboration cycle:**

**Foundational** – What are the most basic elements of the system and the collaboration? Foundational questions help participants understand their respective values and expectations within the system, including the benefits of the status quo and the costs associated with creating change.

**Aspirational** – What could we achieve together through a collaboration? Aspirational questions help players explore what is possible if freed from the constraints of how the system is operating today.

**Procedural** – What are the policies, procedures and rules that need to be in place for players to assume shared responsibility for achieving change together? Procedural questions help define the rules of interaction that will guide the collaboration, as well as who should be engaged in the process.

## TOOLS



### Techniques to strengthen inquiry skills include:

- Engage with serial collaborators to learn the compelling questions they asked as they journeyed through the collaboration process.
- Practice writing out each type of compelling question and try them out on a trusted peer.



The absence of clear lines of authority within complex systems increases the value of trust among the stakeholders that make up the system. We are more willing to invest time, talent and treasure with those we trust. That is why **collaborations move at the speed of trust.**

While trust can be built, it takes time and an understanding of the root causes of the lack of trust. Too often, advocates of collaboration make the mistake of convening group meetings early in the process when stakeholders don't trust each other enough to talk candidly about their priorities and motivations. As Kirstin Toth of GAR Foundation so astutely observes, "Trust is built one-on-one, not in group settings." One source of distrust can be a competitive environment, and the economic development arenas where our Fund operates can be quite competitive. Team NEO is a case in point. The nonprofit business-philanthropic partnership supported by our Fund has spent the last two years in a very deliberate way understanding how the rules of the game will work so that it might build more trust within the business development system and work toward a common, regional goal of improved economic performance.

Collaborative civic leaders use their inquiry skills to understand what it will take for stakeholders to develop more trust with each other. They also adopt behaviors that build trust. Those behaviors include credibility, reliability and ability to engage on a personal level with others, as well as the ability to focus on the shared goals, rather than individual or organizational needs.

## TOOLS



### Techniques to strengthen trust-building include:

- Assess the level of trust within the complex civic system.
- Engage with serial collaborators to learn their techniques for building trust.
- Practice writing out compelling questions designed to build trust.
- Practice identifying what elements of trustworthiness are most important to other stakeholders.

# THE TRUST EQUATION

(Source: Charles H. Green and the [TrustedAdvisor.com](https://www.TrustedAdvisor.com))

**The Trust Equation is a way to measure trust levels generated by the behavior of individuals and organizations.**

## THE ELEMENTS OF THE TRUST EQUATION ARE:

**Credibility** – Relates to our words and is revealed in our credentials and our presence.

**Reliability** – Relates to our actions and is revealed by keeping our promises.

**Intimacy** – Relates to our emotions and is revealed by how comfortable others are working with us.

**Self-orientation** – Relates to our caring and is revealed in whether our focus is on ourselves or on the needs of others.

$$\begin{array}{c} \leftarrow ( \text{CREDIBILITY} ) + ( \text{RELIABILITY} ) + ( \text{INTIMACY} ) \\ \hline ( \text{SELF-ORIENTATION} ) \rightarrow \\ = \\ \text{TRUSTWORTHINESS} \end{array}$$

The Trust Equation can be used by collaborative leaders to identify how to best build trust with others. For example, collaborative leaders can clearly communicate that they are committed to improving the outcomes of the system, and are not overly focused on their own organization taking credit for those outcomes. Such steps demonstrate the leader's self-orientation, which is critical to developing trustworthiness.

Collaborative leaders must also pay attention to what elements of the trust equation are most important to those with whom they are trying to build trust. For example, a stakeholder who clearly values reliability will not trust a leader who fails to follow up on his/her commitments.

## THE RIGHT KIND OF LEADERSHIP

The right kind of leadership is essential to successful collaborations. Collaborative leaders help participants in a collaboration better understand the complex system they are working in, use inquiry to help participants understand what changes are possible, and build strong trust among the participants so they are willing to assume shared responsibility for achieving shared goals..



## INTERACTION

## HEALTH

## RESULTS

# EVALUATION

Evaluation of the collaboration process and its outcomes is essential for partners, including funders, to make the changes that are necessary to journey through the collaboration cycle and achieve the shared goals. If there is one guarantee in the collaboration process—regardless of the size of the system or the quality of the participants—it is change. Effective and continuous evaluation guides that change.

Evaluating the performance and outcomes of a collaboration is different from evaluating a program or organization. Evaluators of collaborations should be well-versed and experienced in the collaboration process and the critical success factors. Just as a baseball scout would never be sent to evaluate a running back, an evaluator steeped in programmatic logic models should not be asked to design or execute the evaluation of a collaboration.

*“Evaluators of collaborations should be well-versed and experienced in the collaboration process.”*

**Network Impact and the Center for Evaluation Innovation have identified distinct characteristics of collaborations that influence how evaluations should be conducted. Namely, collaborations:**

- **Involve multiple participants.** Evaluators need to understand how they connect, interact and influence with each other.
- **Are dynamic.** As the participants' understanding of the purpose and goals of the collaboration evolve, so will the activities. Evaluators need to adjust along with the collaboration.
- **Can evolve slowly;** so will the evaluation.
- **Have a “chain of impact.”** That chain includes the impact the process has on each partner; the impact partners have on each other; and the impact they have individually and collectively on the system. Evaluators need to understand this chain and choose which elements of the chain will be their focus.

**How the evaluation is conducted and what gets evaluated depends on the stage of the collaboration cycle. But within each stage there are common elements that can be evaluated:**

**Interaction:** What emerges from a collaboration is determined by how well the independent stakeholders interact with each other; and ultimately whether enough stakeholders become partners in a network and assume shared responsibility for achieving shared goals. Evaluators can measure the collaboration's inclusiveness, the level of respect and trust among the participants, and their focus on improved outcomes.

**Health:** Separate from the quality of interactions among the participants, the health of a collaboration can be evaluated by tracking the amount of resources—both time and dollars—that are invested; the degree to which partners share vision and goals; the pace at which the participants proceed through the collaboration cycle; and the number, stability and level of engagement of partners.

**Results:** There are three types of results that evaluators should try to measure within a collaboration:

- **Process Results** – Results that demonstrate the effectiveness of the critical collaboration functions that need to be performed to support and sustain the collaboration process.
- **Interim Outcomes** – Results that demonstrate the collaboration is progressing through the collaboration cycle and/or achieving milestones toward the collaboration's goal(s).
- **Long-term Outcomes** – Results that demonstrate the collaboration is making progress or achieving its goal(s).



## EXPLORATION STAGE EVALUATION CHECKLIST



### Interactions

- Key stakeholders with the most influence over the outcomes of the system are participating in the process.
  - All constituencies, including those with lived experience, are participating.
  - Participants are building connections with each other.
  - Participants' interactions reflect a commitment to improved outcomes.
  - Stakeholders are exercising galvanizing leadership.
  - Stakeholders are exercising collaborative leadership.
- 

### Health

- Stakeholders have agreed to learn together.
  - Stakeholders are learning together.
  - Responsibility for performance of collaboration functions is clear.
  - Can answer:
    - What level of resources have been allocated and by whom?
    - How often do the participants meet?
    - What is each stakeholder's level of participation?
    - How often do they communicate with each other?
- 

### Results

- Each participant values the process.
- The collaboration has developed and analyzed data that contribute to shared learning.

*“Evaluating the performance and outcomes of a collaboration is different from evaluating a program or organization.”*



## DEVELOPMENT STAGE EVALUATION CHECKLIST



### Interactions

- The key stakeholders with the most influence over the outcomes of the system are participating in the process.
  - All constituencies, including those with lived experience, are participating.
  - Participants are building connections with each other.
  - Participants' interactions reflect a commitment to improved outcomes.
  - Stakeholders have built trust with each other.
  - Stakeholders are exercising galvanizing leadership.
  - Stakeholders are exercising collaborative leadership.
- 

### Health

- Stakeholders are making choices together.
  - Responsibility for performance of collaboration functions is clear.
  - There is a structure in place to coordinate the collaboration.
  - Participants are making progress toward identifying a common agenda and shared goals.
  - New stakeholders are engaging in the process.
  - The collaboration has the capacity to communicate.
  - Can answer:
    - What level of resources have been allocated and by whom?
    - How often do the participants meet?
    - What is each stakeholder's level of participation?
    - How often do they communicate with each other?
    - Are stakeholders exiting the process?
- 

### Results

- Each participant values the process.
- Stakeholders articulate a shared understanding of what they could do together.
- Partners have developed a shared vision and shared goals for what they will do together.

*(continued)*

- Partners articulate how they each will assume shared responsibility for achieving the vision and goals.
- Partners have agreed on shared metrics.
- Can answer:
  - What is the quantity and quality of the collaboration's communications?



## MATURITY STAGE EVALUATION CHECKLIST



### Interactions

- The key stakeholders with the most influence over the outcomes of the system are participating in the process.
- All constituencies, including those with lived experience, are participating.
- Participants are building connections with each other.
- Participants' interactions reflect a commitment to improved outcomes.
- Stakeholders have built trust with each other.
- Trust is increasing, according to stakeholders.
- Stakeholders are exercising galvanizing leadership.
- Stakeholders are exercising collaborative leadership.

---

### Health

- More partners are providing financial and/or other forms of support.
- The network is sustainable.
- Stakeholders are making choices together.
- Responsibility for performance of collaboration functions is clear.
- There is a structure in place to coordinate the collaboration.
- If a board is in place to oversee the backbone entity performing the collaboration functions, board members are performing roles and responsibilities.
- Measures are in place to evaluate the effectiveness of the collaboration functions.
- There is shared understanding of common agenda and shared goals.

*(continued)*

- Partners have agreed on metrics and milestones to demonstrate progress.
- New stakeholders are engaging in the process.
- Can answer:
  - What level of resources have been allocated and by whom?
  - How often do the participants meet?
  - What is each stakeholder's level of participation?
  - How often do they communicate with each other?
  - Are stakeholders exiting the process?

## Results

- Each stakeholder values the process.
- Stakeholders are making progress on their individual and collective goals.
- Partners are reporting shared metrics.
- Partners are achieving specific milestones.
- More resources are being attracted to the collaboration or its partners.
- Other stakeholders are altering their policies or practices to support the goals of the collaboration.
- Can answer:
  - What is the quantity and quality of the collaboration's communications?



## CREATIVE DESTRUCTION STAGE EVALUATION CHECKLIST



### Interactions

- The key stakeholders with the most influence over the outcomes of the system are participating in the process.
- All constituencies, including those with lived experience, are participating.
- Participants are building connections with each other.
- Partners are raising new issues that need to be addressed.
- Participants' interactions reflect a commitment to improved outcomes.
- Stakeholders have built trust with each other.

*(continued)*



- Trust is increasing, based on feedback from stakeholders.
  - Stakeholders are exercising galvanizing leadership.
  - Stakeholders are exercising collaborative leadership.
- 

## Health

- More partners are providing financial and/or other forms of support.
  - Stakeholders are making choices together.
  - Responsibility for performance of collaboration functions is clear.
  - There is a structure in place to coordinate the collaboration.
  - The collaboration is evolving to reflect the changing perspectives of partners.
  - Measures are in place to evaluate the effectiveness of the collaboration functions.
  - There is shared understanding of common agenda and shared goals.
  - Partners have agreed on metrics and milestones to demonstrate progress.
  - New stakeholders are engaging in the process.
  - Can answer:
    - What level of resources have been allocated and by whom?
    - How often do the participants meet?
    - What is each stakeholder's level of participation?
    - How often do they communicate with each other?
    - Are stakeholders exiting the process?
- 

## Results

- Each stakeholder values the process.
- Stakeholders are making progress on their individual and collective goals.
- Partners are reporting shared metrics.
- Partners are achieving specific milestones.
- More resources are being attracted to the collaboration or its partners.
- Other stakeholders are altering their policies or practices to support the goals of the collaboration.
- Partners have identified a process for re-evaluating the vision, goals and value of the collaboration.
- Can answer:
  - What is the quantity and quality of the collaboration's communications?

## NETWORK LEADER PERFORMANCE CHECKLIST



After partners have assumed shared responsibility for achieving shared goals, they often form a network that aligns and coordinates their respective efforts. The network requires backbone capacity to perform specific functions. The person at the helm of the network has an unusual job. While not in control of any of the partners, the network leader nonetheless needs to influence and coordinate their efforts.

As noted in the earlier job description for a network leader, the job requires a distinct set of skills. Evaluating how a network leader is exercising those skills and performing critical functions can be challenging because the leader's key constituents—the partners within the network—bring different perspectives and value propositions to the work. Some partners may not value the work of the network, particularly if the network is identifying performance and outcome issues that the partners are reluctant to acknowledge or address. At the same time, a network leader unable to build trust among partners cannot be effective. Evaluators of network leaders need to assess how well the leader is balancing the inherent tensions between the needs and desires of the individual partners and the need to improve system outcomes.

- The network leader understands the priorities and motivations of the partners.
- The network leader engages diverse audiences.
- The network leader has built trust among the partners.
- The network leader has built trust with individual partners.
- The network leader has developed broader and deeper support for the collaboration.
- Partners value the work of the network leader.
- Partners look to the network leader for direction.
- The network leader is able to communicate his or her contribution without taking credit.
- The network leader is able to guide the partners through the collaboration cycle.



## FROM “HOW” TO “HOW TO”

The vast majority of this handbook is devoted to the “how” of cross-sector collaboration—meeting the preconditions and fulfilling the essential elements. The focus on the how invariably prompts questions about “how to.” Leaders eager to catalyze change understandably want a place to start, or a place to start to get an existing “coblaboration” back on the “collaboration” track.

The following section is designed to help leaders identify a few initial steps to take along the collaboration journey.

### ONE .....

Build shared understanding of the system’s performance. Design a process through which key stakeholders can learn together what outcomes are being generated by the system, how those outcomes have changed over time, and what key factors are influencing the behavior and outcomes within the system. Without a shared understanding of what is happening and why, it is impossible to develop shared goals for enduring positive change.

### ..... TWO

Identify a “best friend” or two who can help you design the shared learning process. When it comes to cross-sector collaboration, there is much truth in the African proverb, “If you want to go fast, go alone; if you want to go far, go with others.” Nothing about a collaboration should be done in isolation, including the first steps.

### THREE .....

Remember collaboration moves at the speed of trust. Take the time necessary to build trust with key stakeholders; make more best friends. Trust is built one-on-one, not in group settings.

**And if after reading this handbook it seems your collaboration has gotten off track, or you realize it was never on track in the first place, there is hope.**

First, assess whether the preconditions for collaboration are present. Many collaborative efforts get started without a compelling cause, galvanizing leadership or high-performing organizations. Often these collaborations are fueled by the availability of funding dollars. If the preconditions don't exist, you will need to encourage others that the collaboration process needs to be paused so that the necessary conditions can be created.

Second, ask the coordinator of the collaboration to use an illustration of the Collaboration Cycle and its related traps at the next meeting to help the partners identify where they are in the cycle and in which trap they are stuck. Naming the problem can sometimes be a helpful first step to solving it.

And finally, remember collaboration moves at the speed of trust. Weak or broken trust is the most common reason for collaborations to go awry. Trust is built one-on-one. If needed, stop meeting in groups until you've built strong enough trust with key stakeholders to put the collaboration back on track.

.....

*“Perhaps the most important lesson of collaboration is it requires continuous learning.”*

.....

From the start, our Fund's goal has been to transform the Northeast Ohio economy. To achieve that, we knew we needed to work across sectors, align resources and support collaborative strategies among diverse partners. This handbook reflects the lessons we have learned so far through that work. Perhaps the most important lesson of collaboration is it requires continuous learning. We hope that what we've learned and shared in this handbook helps you take stock of and strengthen your and your organization's role in championing effective collaboration. If we haven't met already, we look forward to learning with you as we each journey down the collaboration path to enduring, positive community change.

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## ACKNOWLEDGMENTS

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As a collaboration that supports other collaborations, the Fund for Our Economic Future is a wonderful place to learn about how to design and sustain collaborative efforts that result in enduring, positive change. Many of the lessons in this handbook were learned the hard way—by doing, failing, adapting, and doing again. That our members have the patience and the persistence to stick with the collaboration process is one of the many amazing features of our Fund.

Each and every one of our Fund members has contributed to the lessons in this handbook, but I'd like to highlight a few in particular who pushed us all to be more intentional in our work and to capture our lessons learned.

Roy Church, the now-retired president of Lorain County Community College, and Deborah Vesey, president of the Deaconess Foundation, co-chaired our Fund's Engage & Empower Committee for several years. This committee wrestled with the challenges of how the Fund should act, and how we could help others, to support effective collaborations.

Denise Zeman, the former president of the Saint Luke's Foundation, and Karen Nestor, a former trustee of The Bruening Foundation, challenged me to become a more rigorous student of complexity and collaboration, and they introduced me to the Collective Impact framework for cross-sector collaboration. Their influence on me has been transformative.

Several Fund members support collaborations that are aligned, but separate from the Fund. I benefited greatly from having the chance to observe and/or work with collaborations catalyzed by the Sisters of Charity Foundations of Cleveland and Canton, the Saint Luke's Foundation, the Deaconess Foundation, Third Federal Foundation, GAR Foundation, The Raymond John Wean Foundation, the Community Foundation of Lorain County, and the Akron Community Foundation.

Foundations aren't the only grantmakers wrestling with the challenges of collaboration. Our Fund has worked with a half dozen United Ways in Northeast Ohio on different collaborations. The United Way of Summit County, in particular, provided me with regular reality checks and continues to demonstrate what collaborative leadership really looks like.

The Fund knows full well that the three most important words at the civic table are, "I don't know." That is why we constantly seek insight from others to foster our continuous learning. The contributions others have made to our thinking are highlighted throughout this handbook, but I want to specifically thank a few who have created invaluable learning environments:

John Kania and his colleagues at FSG and the Aspen Institute have created a learning community, the Collective Impact Forum, that provides a safe place to share experiences, complain about challenges, and explore new possibilities. If you are looking for help in the wonderful world of collaboration, the Forum is a great place to start.

Liz Weaver and Paul Born of the Tamarack Institute were the primary facilitators at the first workshop I ever attended on collaboration. They provided a powerful foundation that I continue to use to support my learning.

Amy Liu, Bruce Katz, Jennifer Bradley (now with the Aspen Institute) and the rest of the Brookings Institution's Metropolitan Policy Program team provide a venue for leaders from metro areas across the country to learn from each other. Together we learned the "how" of our work is as important as the "what."

Mark Scheffler, president of Leadership Akron, and Marcy Levy Shankman, formerly of the Cleveland Leadership Center, joined me in shaping our shared understanding of the critical skills demanded to exercise collaborative civic leadership. Learning with Mark and Marcy has been an exceptionally rewarding experience, professionally and personally.

And finally, I would like to thank Fund President Brad Whitehead and all of the staff at the Fund for supporting my efforts to better understand collaboration, and for fully embracing this project. The cause of collaboration and the mission of the Fund has no greater champion than Brad; for his leadership and friendship I am eternally grateful.

Chris Thompson | August 2016

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TESTIMONIAL



*“In this increasingly complex world, authentic collaboration provides real hope for tackling tough issues. Chris provides us with a field-tested guide to accomplish this unnatural behavior.”*

**Brian Frederick**

President and CEO | Community Foundation of Lorain County  
Chair | Fund for Our Economic Future

Together, we advance our missions.

Together, we enhance our knowledge.

Together, we leverage our impact.

**We are better together.**



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