The Collaborative Nonprofit Organization
Leveraging Impact

What's to come…

✓**Four things your organization can do to be a good collaborative partner and ramp up its success rate.**
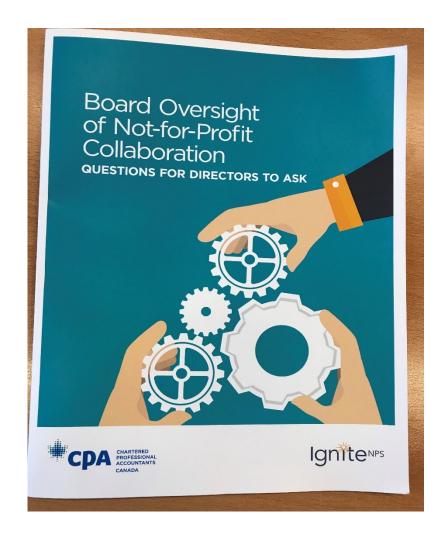
✓**Some 5% shifts.**

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Three Helpful Resources

On-line resource:

Tamarack Institute:
https://www.tamarackcommunity.ca/

Collaborations:
A brief illustration of what you seek and what you sometimes get……

In collaborations, you seek this kind of synergy…

But sometimes get this…

You design a distributed power structure….

But it can feel like this.

You seek a clear and shared sense of direction….

Because without it, this happens.

You want to feel this with your partners….

But sometimes you feel this.
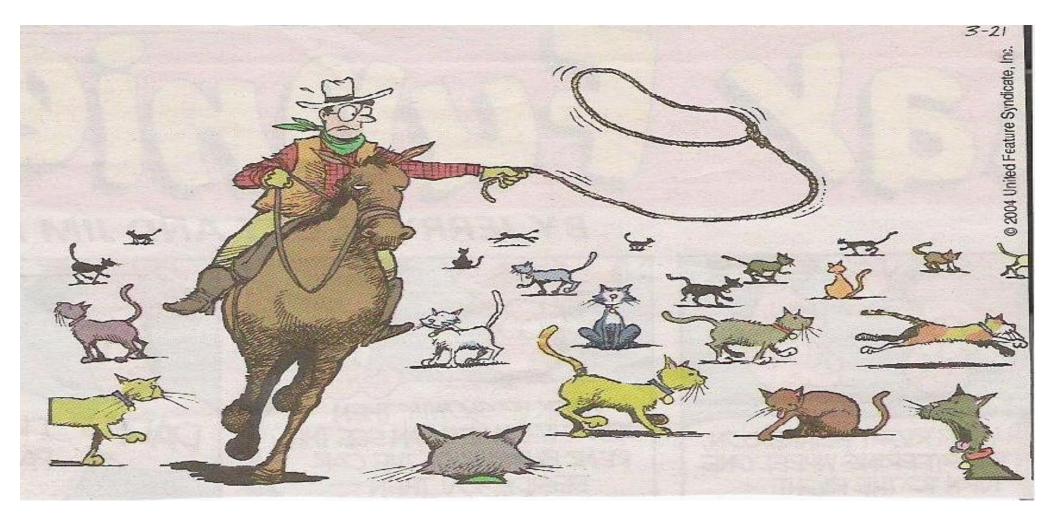
While the goal is to work in harmony….
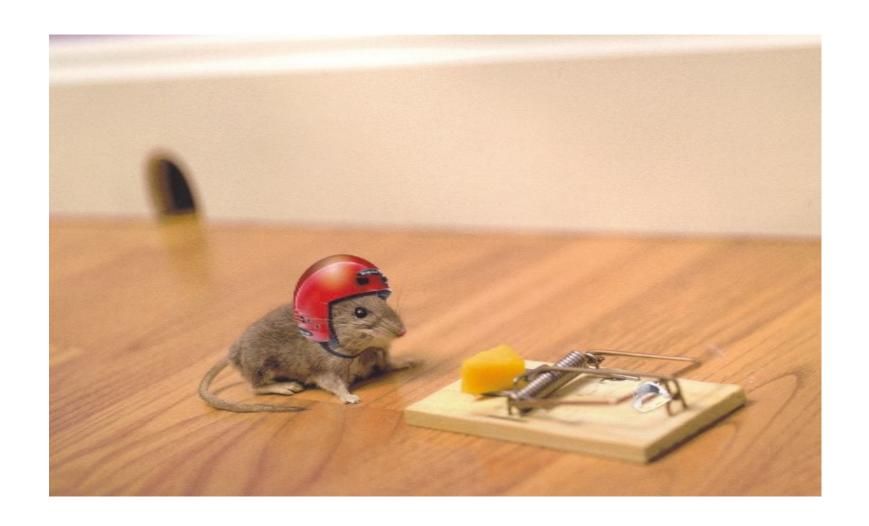
There's a lot of herding….

….and a few of these…..

So you prepare for risk.

And remember that it's all about this.

What is collaboration?

- **Where organizations come together to achieve a common goal that's better accomplished by working together.**

- **Used interchangeably with: *partnership, alliance, coalition, network, integration, collective impact*….**

- **It's NOT the same as a merger or amalgamation. And it's more than just engagement strategies with key stakeholders.**

Kinds of collaborations

Simple ← ——————————————————————— → *Complex*

Shared

Joint referrals

Pooled resources

Coordinated services

Integrated

Integrated programming

Large scale change

Collective impact initiatives

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You can't just apply Management 101 because collaborations are different than organizations:

- **They bring together <u>multiple</u> organizations, each with their own mandate, stakeholders, culture, processes and programs**

  - **to work together toward <u>mutually</u> beneficial outcomes**

  - **with joint responsibility and accountability for success.**

There is <u>no 'boss'</u>.

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Why you can't just apply Management 101.

It's like dancing with an octopus. There are a lot of moving parts.

Why you can't just apply Management 101.

And…. it can't be forced – because its more organic than linear…

Here's what's tricky. How do you:

- **Commit to being accountable when you aren't the only one responsible?**

- **Build consensus among multiple organizations, while being efficient and producing results?**

- **Manage risks while not being fully in control?**

- **Integrate systems and processes, when everyone thinks they have the best ones?**

The Collaborative Organization

Four strategies for positioning the organization for success.

1. Have compelling reasons.

2. Create an enabling culture.

3. Understand the board's role.

4. Approach it as an investment.

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1. **Have compelling reasons.** Here's a few broad trends.

More impact (*helps move the needle on complex issues*)

The Collaboration Imperative

It's an expected way of working (*increased agility*).

Increase performance (*expanded capacity; greater efficiencies; enables scaling*)

Technology enables it (*co-creation tools; better communications and engagement opportunities*)

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1. Have compelling reasons. Think about:

Can we map the larger system in which we operate (*e.g. name all the organizations and formal and informal networks that affect our mission or are affected by it; show the interdependences and connections*)? What are the assets, resources, markets, talents or mission that we could bring to other organizations?

How can collaboration with other organizations and networks advance our vision, mission, strategic directions and priorities?

What can be better achieved by working in collaboration with others that can't by working on our own (*e.g. mission impact, program delivery; human resource and infrastructure capacity*)? *Think about what we do best and where we can cede ground to other organizations that can do something better.*

Does the board and staff leadership have a shared understanding about the purpose of collaboration and its benefits?

2. **Create an enabling culture.**

It can help or hinder collaborative success. So, what is it?

- It's a combination of <u>values, mindsets and ways of interacting</u>.

- They can be <u>formally documented</u> (*e.g. statements, policies*) and <u>informal</u> (*e.g. long-standing habits and norms*) as well as declared or undeclared (*e.g. individual attitudes, perspectives and beliefs of board members and staff*).

- Culture is important to the success of collaboration because it's a significant <u>influencer</u>. For example, it can: *determine how decisions are made; where power resides; how people behave toward others; what structures and processes are put in place; and the leadership qualities that are sought and nurtured*.

2. Create an enabling culture for collaboration.

Here's some <u>indicators</u> of a collaborative culture:

✓**There's a strong north star (***e.g. vision, outcomes, goals, priorities***) – a compelling and collective sense of purpose is shared by the board and staff. This reduces the need for controlling hierarchies, promotes shared decision-making and accountabilities and puts achievement of mission at the centre of all choices and decisions (***not just organizational sustainability***).**

✓**Diversity and equity are part of the organization's ethos. The board and staff demonstrate it in both their words and actions. For example, they feel comfortable listening to and responding to different, and sometimes divergent perspectives.**

✓**The board and staff leadership are comfortable with measured risk (***mitigate, not necessarily eliminate***) because sharing power, authority and accountability is inevitably risky.**

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… and a few more indicators to look for:

✓ **The board and staff leadership, and teams across the organization, work in close partnership, not siloes. If an organization doesn't work collaboratively internally, they are less likely to be good collaborative partners with other organizations.**

✓ **Information is transparent and timely. The board and staff leadership don't see information as a source of power, but as something that enriches collaborative decision-making and improves outcomes.**

✓ **Agility is highly valued. People describe the organization as nimble, adaptive and responsive to opportunities as they arise. Policies and processes are only as formal and centralized as necessary and organizational leaders are comfortable with ambiguity and a bit of chaos. Staff feel empowered to make collective decisions with collaborative partners, without having to continuously check-in.**
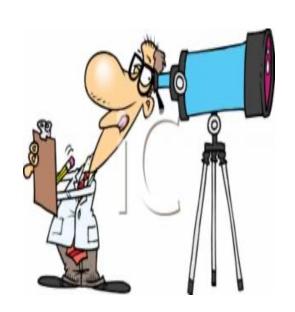
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2. Create an enabling culture for collaboration.

People create culture so it's important to **intentionally recruit** board members and staff leadership with the right competencies to seek out and nurture good collaborations.

Some skills, knowledge, experiences and personal attributes to seek:

Reasons

Investment · Culture

Board's role

Comfort with **complexity and a system thinker**. They see the big picture and are okay with 'messy'. Also, an enabler and connector who bridges diverse interests and knows how to harness talents and empower others.

Resilient, adaptable and flexible so they're comfortable with people who have different life experiences and perspectives and can take advantage of opportunities and respond easily to shifts. Also, they value processes but feel they should only be as complicated as they need to be.

Put **purpose** (*mission, vision, values*) at the centre of all key decisions. They get things done but have patience for the 'long-game' of achieving meaningful outcomes. They also embrace an abundance, not scarcity mindset (*e.g. imagine other organizations as potential partners, not competitors; recognize that to advance the mission, there's more talent and resources outside the organization than in it*).

3. **Understand the board's role**.

Most of an organization's collaborative activities fall into the operational responsibilities of the staff leadership. However, the board has a key fiduciary responsibility for collaborations, which includes:

✓**Foresight and insight**

✓**Oversight**

✓**Support**

3. Understand the board's role.

Foresight and insight

Work with staff leadership to determine how collaboration:

✓ *advances the mission and the organization's broader ecosystem*

✓ *fits into its purpose, vision, values, strategic directions and priorities*

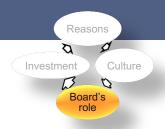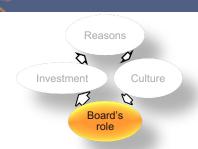✓ *helps maintain a strong and vibrant organization.*

Oversight:

✓ **Be assured the right portfolio of collaborations are in place, generating critical benefits and a sound use of resources.**

✓ **Establish the CEO/ED reporting system on collaboration status, issues and outcomes.**

✓ **Understand potential/existing risks and their mitigating strategies. If there's <u>high-risk</u>, engage more closely (*e.g. whether to commit, strategizing issues, monitoring progress*). *Such as:***

❑ **There's a major impact on the organization (*e.g. could substantially affect mission, policies, procedures, assets, resources, reputation and/or ability to deliver programs and services*).**

❑ **When decision-making/accountabilities are complex *(e.g. complicated governance structures; significant differences in capacity; accountability to multiple funders; difficulty measuring performance and impact).***
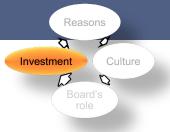
(Note: The board's role in oversight is more hands-on if there is a small staff without the capacity to manage it)
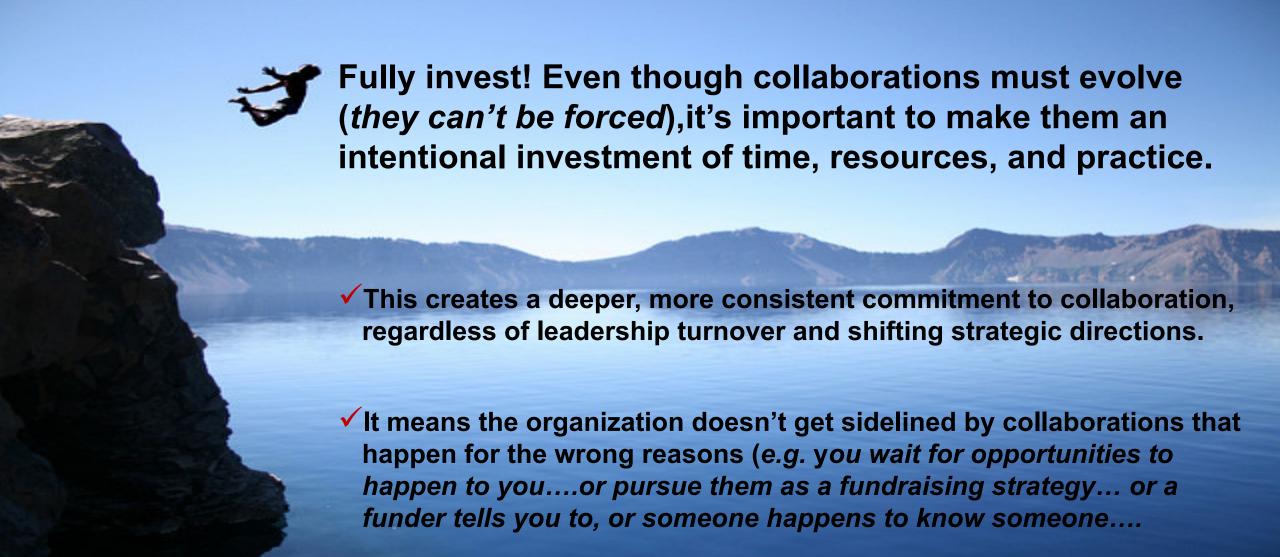
Reasons
Investment   Culture
Board's role

Support:

✓ **Help build and maintain an organizational culture that enables strong collaborations**

✓ **Empower the staff leadership to seek out, formalize and execute collaborations within clearly articulated, board-agreed parameters**

✓ **Help leverage relationships and networks and be ambassadors for the organization's mission**

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4. **Approach collaboration as an investment.**

Fully invest! Even though collaborations must evolve (*they can't be forced*),it's important to make them an intentional investment of time, resources, and practice.

✓**This creates a deeper, more consistent commitment to collaboration, regardless of leadership turnover and shifting strategic directions.**

✓**It means the organization doesn't get sidelined by collaborations that happen for the wrong reasons (*e.g. you wait for opportunities to happen to you....or pursue them as a fundraising strategy... or a funder tells you to, or someone happens to know someone....*)**

4. Approach collaboration as an investment.

Three ways:

These aren't necessarily done by the board, but the board ensures they are done.

✓ **Develop a Board policy**

✓ **Create a criteria screen**

✓ **Understand and mitigate risk**

Create a collaboration board policy because it:

- ✓ **Signals the importance of collaboration to the organization**

- ✓ **Delineates decision-making and empowers the staff leadership**

- ✓ **Clarifies the mechanisms that ensure there's proper oversight**

Reasons

Investment   Culture

Board's role

A collaboration board policy can include:

- ❑ **Describes how 'collaboration' is defined, why it's important and its benefits**

- ❑ **Sets out expectations for keeping an inventory of collaborations**

- ❑ **Identifies the mechanisms for: assessing potential collaborations and monitoring existing ones; managing risk; ensuring alignment with strategic priorities; and meeting accountability requirements**

- ❑ **Describes what requires board input, decision-making approvals and authorization and what's delegated to staff leadership (*see: The Board's Role*)**

- ❑ **Outlines how the collaboration activities are appropriately supported internally (*e.g. time, people, funds*)**

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Create a collaboration criteria screen because it:

- ✓ **Helps in the development and review/revision of agreements.**

- ✓ **Enables a shared understanding about what's important and mitigates risks.**

- ✓ **Empowers staff to make decisions at the collaborative table without constantly 'checking-in'.**

4. Approach collaborations as an investment.

Create a criteria screen. Key considerations:

1. <u>Strategic alignment:</u>

✓ **How will the people/causes we serve measurably benefit?**

✓ **Can it produce better outcomes than working independently?**

✓ **Are the collaborative goals/objectives attainable (*e.g. necessary resources are likely to be available*)? Is it a conducive environment (*e.g. social, political*)?**

✓ **The partners don't have to be similar, but are they compatible (*e.g. vision/mission; values; brand; funding requirements; collective agreements; IT systems*)? Are there concerns about the reputation, ethics or practices of our partners? Can these be overcome or addressed?**

✓ **Will it require significant changes to our organization's structure, policies practices and/or performance? If so, are they worth it?**

4. Approach collaborations as an investment.

Create a criteria screen: Key considerations…….

2. <u>Investment:</u>

✓**Are the <u>partners the right ones</u> to achieve our goals (*e.g. they are legitimate leaders in the community; have a stake in what's to be accomplished; work in ways that enables adaptability and collaborative decision-making*)?**

✓**What is <u>our investment</u> (*e.g. time, assets, resources, talents*)? Can we realistically deliver on it? Will the value we receive exceed the cost?**

✓**What <u>investments are the partners expected</u> to provide? Do we have confidence they can deliver on the significant ones and what are the consequences if they can't?**

✓**Where do we <u>fit into the collaboration</u> (*e.g. lead, backbone, contributor*)? Do we have the capacity to fulfill the role effectively?**

4. Approach collaborations as an investment.

Create a criteria screen: Key considerations…….

3. <u>Implementation:</u>

✓ **Are our staff who are responsible for the collaboration <u>committed to its success</u>? Do they feel adequately supported by us? Are we prepared to empower them to make decisions at the collaborative table without constantly checking-in?**

✓ **Can a good <u>governance structure</u> be put in place that matches the complexity of the collaboration and facilitates effective decision-making (*e.g. relationships, communications, financial arrangements, accountabilities, dispute resolution*)?**

✓ **Are partners prepared to <u>jointly set out</u> shared responsibilities, obligations, exit strategies, evaluation and risk management mechanisms?**

✓ **What are the <u>significant risks</u> to our organization and are we confident they can be reasonably mitigated? What are the risks if we don't participate in the collaboration?**

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4. Approach collaborations as an investment.

Create a criteria screen: Key considerations…….
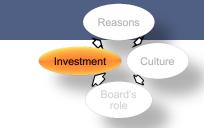
4. <u>Renewal or exit:</u>

✓ **Does it continue to provide us with <u>meaningful and measurable benefits</u> that are aligned with our mission, priorities and goals? Do we still have an internal commitment to it?**

✓ **How well are we doing in <u>accomplishing the intended outcomes</u>? If not well, are there potential course corrections? Do they seem feasible?**

✓ **Is there a <u>high degree of trust</u> between us? Are all the partners fulfilling their responsibilities and obligations? If not, are there reasonable shifts that can be made?**

✓ **Are <u>stakeholders raising any significant concerns</u> about the collaboration? Are they material or can they be easily addressed (*e.g. better communications*)?**

Understand and mitigate risk because it:

✓ **Gives assurance of proper oversight.**

✓ **Intentionally weighs opportunities and benefits against a realistic assessment of the level and likelihood of negative impacts.**

✓ **Frees people to be more agile and innovative.**

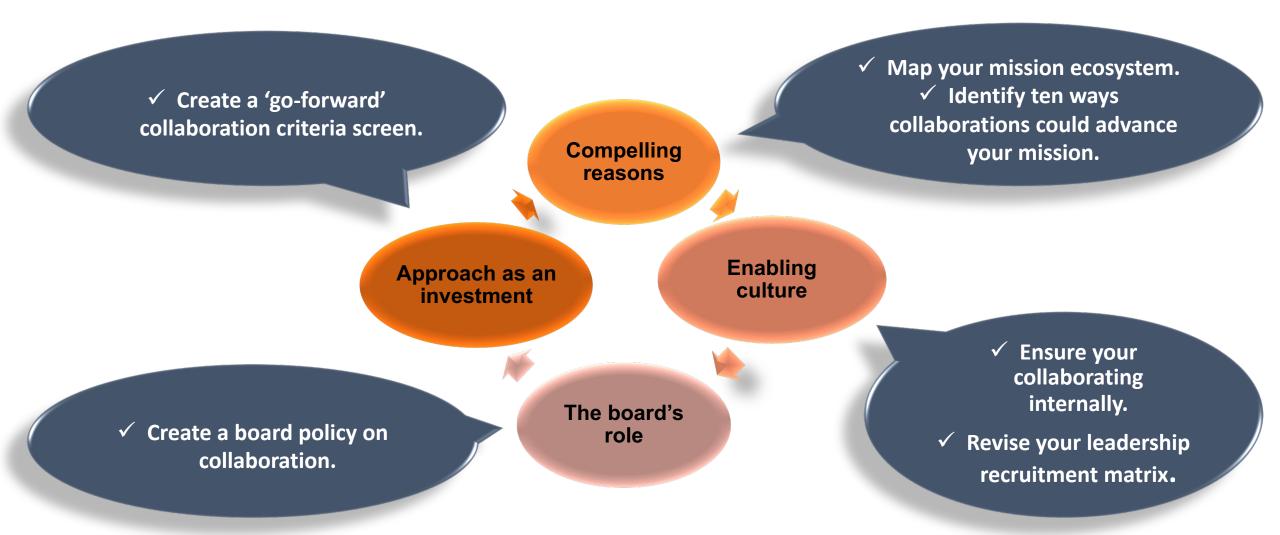# Understand and mitigate risk. Key considerations.

- ✓ **All collaborations bear some risk to the organization because they involve working with people and organizations beyond the control of the board and management.**

- ✓ **They are by nature more complex because there isn't 'a boss' and all partners need to participate in key decision-making. So they must evolve, adapt, renew, slow down, speed up…..It's success is based 90% on trust and 10% on controls.**

- ✓ **The intent is risk mitigation, not elimination. A key question is: whether it's a good and safe enough opportunity to try?**

Remember that in collaborations, the journey is as important as the results.

Good luck on your journey!