

# How Do We Determine the Right Role to Play in Collaboration?

**Collaborations — groups of grantmakers, nonprofits and other stakeholders aligning around a shared vision and targeting resources and activities in support of that vision — require partners to play various roles to be successful. Once grantmakers make the decision to work together, the next step is to consider what role(s) we play in the collaboration. This piece outlines a variety of roles grantmakers can play in collaboratives and offers tips for identifying the right role(s) for each organization.**

*“Whenever we see an opportunity to engage in collaboration, the first question we ask is, ‘Do we have donors who are passionate about this subject and would they want GHCF to play a role?’ Next, we examine whether we have the staff capacity to contribute and consider the role we can play in the collaborative process. We want to be sure our efforts are needed and impactful.”*  
— Renée Wizig-Barrios, senior vice president and chief philanthropy officer, Greater Houston Community Foundation

## What types of roles can we play?

There are many options and several ways to think about roles in collaboration. A funder may play one particular role in one collaborative and a different role in another. For example, a grantmaker may be highly engaged in one collaborative effort while providing light-touch support to another. Or the organization may make short-term, limited financial contributions to one while contributing significant, long-term investments to another. There is no one right role for a funder in a collaborative, and all roles are needed for collaboratives to be successful.

Additionally, a grantmaker may play different roles over the lifetime of a collaborative. For example, the [Sand Hill Foundation](#) partnered with other

funderson to launch the Silicon Valley Out-of-School-Time Collaborative in 2010. Since that time, the governance model has shifted from funder driven to grantee driven, and Sand Hill has transitioned from a catalyst role to participant and adviser roles. Being adaptable as roles change over time is important for the long-term success of a collaborative.

A list of roles grantmakers can play in a collaboration is presented below with links to case studies that illustrate the various roles. This list is not exhaustive; different collaborations may require other roles. For some collaborations, a grantmaker may fill more than one role or may fill different roles at different times. This is why adaptability and flexibility are important traits for grantmakers regardless of the roles they play.

Role	Purpose	Considerations	Example
<b>Catalyst</b>	<ul style="list-style-type: none"> <li>Refine the purpose or vision of the collaborative with partners.</li> <li>Educate others about the issue.</li> <li>Explore new and established partnerships that could assist the collaborative.</li> </ul>	<ul style="list-style-type: none"> <li>While grantmakers may have a goal and strategy in mind for addressing an issue, remaining open and flexible when inviting others to partner is key.</li> </ul>	The <a href="#">Philadelphia Foundation</a> encourages nonprofits to improve efficiencies and reduce duplicative efforts by modeling collaboration.
<b>Administrator</b>	<ul style="list-style-type: none"> <li>Serve as a primary point of contact for the collaborative.</li> <li>Coordinate logistics (e.g., set up meetings, disseminate information, etc.).</li> <li>Serve as the fiscal agent.</li> </ul>	<ul style="list-style-type: none"> <li>This role requires great communication skills and keen attention to detail. It also requires a great deal of time, so grantmakers should be prepared to dedicate resources when serving in this role.</li> </ul>	The McCormick Foundation administers the <a href="#">Unified Outcomes Project</a> , a nonprofit collaborative that focuses on evaluation capacity building.
<b>Weaver</b>	<ul style="list-style-type: none"> <li>Connect stakeholders who bring the necessary resources to support the collaborative.</li> <li>Build trust among partners.</li> <li>Sustain the collaborative spirit.</li> <li>Onboard/mentor new partners.</li> </ul>	<ul style="list-style-type: none"> <li>The culture of the collaborative may evolve as staff and partners transition, so the weaver plays a role throughout the collaboration.</li> </ul>	The <a href="#">Gordon and Betty Moore Foundation</a> employs strategies that weave organizations together into networks.

Role	Purpose	Considerations	Example
<b>Expert</b>	<ul style="list-style-type: none"> <li>Contribute specialized knowledge to the issue.</li> <li>Assist with tasks such as analysis, proposal due diligence, facilitation, research and evaluation.</li> </ul>	<ul style="list-style-type: none"> <li>Collaborations often benefit from multiple expert perspectives, so it is helpful to ask a variety of stakeholders to share their relevant knowledge and experience.</li> </ul>	The <a href="#">Iowa West Foundation</a> uses its strong facilitative leadership skills to support and sustain effective cross-sector partnerships.
<b>Participant</b>	<ul style="list-style-type: none"> <li>Participate in the collaboration without assuming a direct leadership role.</li> <li>Support fundraising, training, evaluation, communications, content development and/or access to networks.</li> </ul>	<ul style="list-style-type: none"> <li>Participants should be strategically aligned with and support the collaborative's goals and should bring complementary resources to the table.</li> </ul>	<a href="#">Woods Fund Chicago</a> is an active contributor to the 15-member Chicagoland Workforce Funder Alliance.
<b>Sponsor</b>	<ul style="list-style-type: none"> <li>Support the collaboration financially with funds for staff time, administration, evaluation, research and communications.</li> <li>Fund grants that result from the collaborative.</li> </ul>	<ul style="list-style-type: none"> <li>Policies and processes for making grants, co-funding, or providing infrastructure or administrative funding may vary across foundations, so a clear understanding of expectations is helpful.</li> </ul>	<a href="#">United Way of Washtenaw County</a> invests 90% of its grantmaking budget through the Washtenaw Coordinated Funders model.

*“At times we might collaborate by helping to underwrite a staff person. On the opposite end of the spectrum, we might be uniquely positioned to have a leadership role in a collaboration — we will convene other foundations, the business community and the community at large. Sometimes we may not financially contribute directly towards a collaborative effort, but we may fund research on a particular issue. Other times we serve as fiscal agent and have a seat at the table to meaningfully participate.”*
  
*— Cheryl Walker, trustee, Deaconess Foundation (MO)*

As mentioned above, a grantmaker's role in a collaboration may adapt, grow, shrink or shift over time. By remaining flexible and open to changes or growth

in their roles, grantmakers invite new opportunities and demonstrate the true meaning of being a collaborative partner.

## How can we assess our potential role in a collaboration?

Before determining their own role, grantmakers need to assess the external landscape to understand the roles others are currently playing and identify the gaps that need to be filled. Grantmakers should approach this assessment with open-minded curiosity and expect to learn who is already working on the topic of interest, what strategies (including collaborative efforts) are currently in play, the strengths of and challenges presented by those strategies, and what else is needed to achieve the goal.

Strategies for exploring collaborative roles include the following:

- **Learn the subject matter.** An important precursor to collaboration is gathering the knowledge needed to assess the landscape, learn from related efforts and identify possible paths forward. To gather the necessary information, grantmakers may want to meet with funder colleagues, nonprofit leaders, academics, community members, government officials, faith-based leaders and others. Some funders dedicate several months to understanding the data and the issues before committing to a collaboration.
- **Scan the field.** Research collaborations already in existence to determine if any can serve as a model. Explore the roles, governance structure, processes and policies of other collaborative efforts. What has worked well for these collaboratives, and what could have been done better?
- **Know the players.** Having the right partners at the table can make a real difference to the success of a collaboration. As grantmakers take inventory of existing relationships, they may identify organizations that are already good partners. Perhaps an opportunity exists to strengthen current partnerships to achieve a common goal. Conversely, grantmakers may identify potential partners with whom they have never worked. They may need to play different roles in the collaboration depending on whether they are engaging familiar partners or convening new partners. Understanding the players allows grantmakers to make more informed decisions about the roles they might play.



- **Look inward.** Grantmakers should carefully consider the resources, skills and capacities they could bring to a collaborative effort. Certain roles require specific skill sets and rely on the existence of particular organizational policies and practices. For example, weavers need to have broad networks and be good at bringing those people together. Grantmakers serving as administrators will be most effective if collaboration is an organizational priority and staff have adequate time and resources to complete the job. Conducting an internal assessment and identifying any gaps in resources or skills also allows funders to determine the strengths and traits they should be looking for in partners. This give-and-take is one of the benefits of collaboration.

## Discussing Collaboration Roles with Partners

Collaborative partners with long-standing relationships often develop a solid understanding of each other's strengths and the roles they can undertake as part of joint work. These roles and expectations may not be formalized or explicit; instead, the partners may have established an informal way of working together and leveraging one another's resources based on past experience.

However, clearly articulating and communicating the role each partner intends to play in a collaborative effort is a valuable exercise. In doing so, we should share our expectations — what we hope to receive or gain — as a result of working together. We should also be clear with each other about what role and activities we are not able to undertake as the collaboration moves forward. Some collaboratives, such as [the Washtenaw Coordinated Funders](#) group, articulate roles, expectations and nonnegotiables in a memorandum of understanding that is revisited and signed by organizational leaders annually.

## How do we know what role is right for us?

Grantmakers can contribute various resources to collaborative efforts, including funding, staff time, content expertise, access to networks and communication infrastructure. As grantmakers determine the right role to play in a collaboration, we should also assess what resources we can dedicate to the effort and in what quantity.

*“First identify the role you want to play; then design your organizational structure to help you play that role. If you want to be a leader, you have to take on additional responsibilities. If you just want to be a partner, you have to feel comfortable with not providing as much leadership and allowing other people to lead...understanding how you, as a partner, can influence and maneuver on the things that are most valuable to you.” — Tonya Allen, chief executive officer, Skillman Foundation*

Grantmakers should consider the following questions when determining how to best contribute to a collaborative effort:

1. What change in the community do we hope to see from participating in a collaborative, and how central is that change to our mission?
2. To what extent is our foundation set up to successfully collaborate? (See [Building Collaboration from the Inside Out.](#))
3. How much does our organization value collaboration as a strategy to achieve our goals?
4. What skills and resources can we bring to our potential collaborative partners that would enhance the effort?

Grantmakers may also find it helpful to consider these more tactical questions when examining potential roles in a collaboration:

1. What staff skill sets can our foundation contribute that would be of value to the collaborative (e.g., content knowledge, facilitation, communications, public speaking, evaluation, research, etc.)? How much staff time are we willing to dedicate to the collaborative?
2. What is the process for allocating funding for the collaborative effort, and what is the mechanism/process for allocating funds to pooled funding, if applicable?
3. How much funding can we allocate to the collaborative effort, and how flexible is that funding?
4. Beyond staff time and financial support, what other resources are we willing to contribute to the collaborative effort (e.g., access to other grantmakers, government officials and/or data, expertise with communications and marketing, etc.)?

## Conclusion

Grantmakers may choose to play one or more of a variety of roles as part of a collaborative effort, and these specific roles may change over time.

Determining what roles to play requires that grantmakers assess how their expertise, interests, resources, skills and capacities meet the needs of the collaborative. Examining the external environment and engaging in a process of self-reflection allows grantmakers to determine how to add value to a collaboration in a way that achieves greater impact.

For more information on this topic, see [\*What Are Different Ways to Collaborate?\*](#) (Washington, D.C.: Grantmakers for Effective Organizations, 2015); [\*Building Collaboration from the Inside Out\*](#) (Washington, D.C.: Grantmakers for Effective Organizations, 2015); Lori Bartczak, "[\*The Role of Grantmakers in Collective Impact\*](#)," *Stanford Social Innovation Review*, Fall 2014.