

How Can We Prepare for Collaboration?

In recent years there has been an increased call for more collaboration in the nonprofit and philanthropic sectors. The problems that we seek to address are large and complex, and a go-it-alone mentality will not result in meaningful impact.

However, because collaboration is hard and messy, many grantmakers and nonprofits are uncertain about the best way to move forward. The first step is to look inward and ensure that we have the right elements in place to be good partners and collaborators. This piece discusses several steps that grantmakers can take to prepare for any type of collaboration.

Conditioning for Collaboration

With all the current buzz around collaboration, it may be tempting to agree to collaborate simply because a colleague asks or because there's an exciting initiative happening in the community. Unfortunately, effective collaboration doesn't just happen spontaneously; grantmakers need to lay the right foundation. Before collaborating, it is important to do some self-reflection and preparation.

For more on this topic, see Lori Bartczak, [*Building Collaboration from the Inside Out*](#) (Washington, D.C.: Grantmakers for Effective Organizations, 2015); [*What Mindset Is Needed to Support Collaboration?*](#) (Washington, D.C.: Grantmakers for Effective Organizations, 2015).

Link collaboration to your organization's goals

Successful collaborators are explicit about what they want to achieve and how collaborative efforts can advance those goals. They give careful consideration to the goals of each potential collaborative effort and determine how well that effort aligns with what their organization wants to accomplish. Since it's rare for a collaboration's goals to match an organization's goals exactly, grantmakers need to think about where compromise might be required.

“What does your institution want — and to some extent need — to get out of the collaborative effort? If the goals and objectives of the collaborative seem to be at odds with your individual or organizational wants and needs, then it may not be the right fit.” Paul DiDonato, director, Civil Marriage Collaborative

Determine how you fit into the landscape

Once there is clarity on the goals of a collaboration and how it aligns with the organization’s vision, the next step is figuring out how specific grantmakers fit into the bigger picture. To do this, grantmakers need a solid understanding of the issues and players.

Start by gathering information about the subject matter and the other issues that are related to the collaboration. Get a feel for the other partners and the roles they play to better determine potential opportunities to be involved. Each partner has his or her own goals and motivations, and everyone will need to compromise, so it is helpful to have a good understanding of others’ perspectives. All of these data points may help determine whether there is a meaningful role to play in moving the issue forward.

For each collaboration, grantmakers and nonprofits need to ask, “What role do we want to play? Where can we add value?” Think about the resources, connections and perspectives that you bring to the table, and consider the platform you might have in your community. Some funders also think about what they can’t bring to the table when considering their role. It is important to remain flexible around your role in a collaboration, because roles may change over time or from collaboration to collaboration.

“There’s no point in partnering with somebody who can already do what you can do. Ideally we’re looking for a partner who can do something better than we can, reach people we can’t reach, be present in areas we can’t or help us create change we couldn’t on our own.” Dr. Raymond J. Baxter, senior vice president of community benefit, research and health policy, Kaiser Permanente

Lay the groundwork through relationship building

Successful collaborators build trust with partners. To develop trust, grantmakers must prioritize building strong relationships, not only within our organizations but also with grantees and other partners. When we show that we are willing to compromise or cede control of decision-making, it signals to our partners that they are trusted. Grantmakers with rigid procedures or practices that indicate distrust may need to make changes to strengthen their relationships with grantees and partners.

Certain systemic challenges stand in the way of building relationships, but grantmakers can address these roadblocks head-on. There is an inherent power dynamic in philanthropy; grantmakers hold the money and decision-making authority on how resources are spent. If we want grantees to have an equal say in the decisions of a collaborative, we need to take intentional steps to mitigate these dynamics.

Strong connections are developed through one-on-one interactions between staff members, executives and board members at different organizations. Building this foundation makes it easier to bring stakeholders along to try something new or to secure their buy-in. Developing cultural competence and working well with diverse stakeholders are critical when building relationships. Grantmakers that prioritize spending time with nonprofits in the communities they serve often find that they have more authentic engagements.

“If you want to be a partner in the community, you can’t start from a mind-set of ‘my job is to make grants.’ You have to start with relationship building and joining people on a journey.” Gwyn Barley, director of community partnerships and grants, The Colorado Trust

Key Changes for Collaboration

Once we have taken a hard look at goals, roles and values and are on our way to building deeper relationships, we can consider internal factors that may impact partnerships. Some grantmakers may have work to do internally to build or nurture their collaborative mind-set. The following four practices can help create better conditions for success in collaboration.

Build a diverse and committed leadership

If we are going to prioritize collaboration, our leadership must be bought into the value of — or, better yet, be directly involved in — the network weaving that collaboration requires. A diverse board brings a broader set of

perspectives, questions and relationships. Grantmakers should pay particular attention to how the board is representative of the communities that the funder serves.

“If collaborating is not a vision of the CEO and board, you can feel it. It has an impact on the work and the people doing the work.” Elise Cutini, executive director, Silicon Valley Children’s Fund

Board members and executives should embody the type of collaborative partner the foundation seeks to be. Grantmakers should look for senior leaders who are open and willing to listen to what those around them have to say. These leaders are responsible for mentoring, developing and training the staff members who work in collaborations, and they set the tone through these interactions. Buy-in from senior leadership and the board is a critical factor for making collaboration a priority across the organization.

Focus on communication

Frequent communication, both internal and external, ensures that all partners and stakeholders are aligned on the vision and progress of the collaboration. One way to foster communication is to set aside time for people to get to know one another, which allows them to deepen relationships. Having personal connections makes it easier for participants to discuss challenges and to hold one another accountable.

Some grantmakers prioritize communication about collaborative efforts by adding updates to staff meeting agendas or scheduling special, routine times for staff and executives to discuss progress, needs and issues. It is also important to engage partners and stakeholders, whether that is through in-person meetings or regular email status updates. Communication needs to be a priority for a collaboration to be successful.

Provide the resources required

Collaboration requires resources of all kinds. Leaders can light the spark for collaboration by saying that it is a priority, but they must also fuel the fire by providing the time and money for the organization to be an effective partner. For some grantmakers, this means carving out more time for staff to focus on collaboration, which may require an increase or change in staffing. For others, this means building more administrative expenses into their budgets to help cover the costs of collaboration.

Some grantmakers have streamlined their internal processes to encourage program officers to spend more time in the communities the foundation serves. Similarly, things like a program officer's portfolio size are important factors to evaluate when considering the extent to which staff can be collaborative. Staffing structures and responsibilities play huge roles in how organizations are able to collaborate, and grantmakers may find that decreasing the amount of work related to the administrative mechanics of grantmaking gives staff valuable time to focus on collaboration.

Ensure that collaboration remains a priority

The activities required for collaboration can sometimes get lost in the press of day-to-day demands, so many grantmakers use formal mechanisms to keep the work on track. Because much of what is required for collaboration (relationship building, convening, communication, etc.) can be hard to measure or may get pushed to the bottom of a to-do list, some grantmakers keep a focus on these activities through job descriptions, performance goals and professional development.

"It's useful to be clear about what the expectations are and to help people recognize where there are areas for growth." Renée Wizig-Barrios, senior vice president and chief philanthropy officer, Greater Houston Community Foundation

For example, the Greater Houston Community Foundation uses a set of behavioral competencies for collaboration among staff members that includes things like accepting responsibility, championing customer needs and solving complex problems. Naming and formally tracking these behaviors shows an organizational commitment to collaboration to external audiences and staff.

Conclusion

Most funders and nonprofits value working together, and many are looking for ways to improve the quality of their collaborations. Even if some of what we try doesn't work, deepening relationships with grantees and other stakeholders builds a strong foundation for future efforts. With the right conditioning and enabling environment, we can make progress on effectively partnering with others to achieve meaningful impact.