

Collaboration as THE Key to Success

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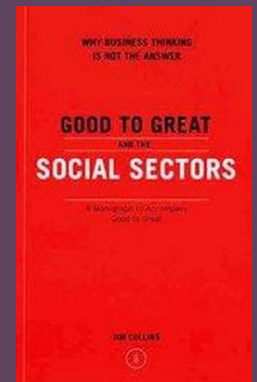
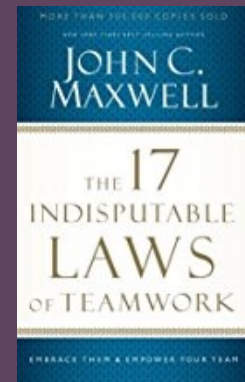
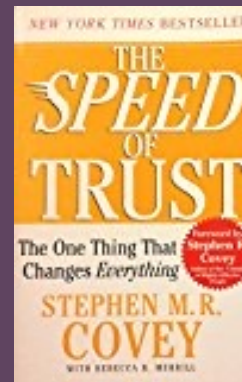
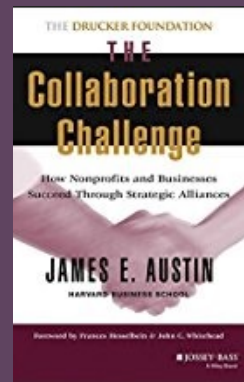
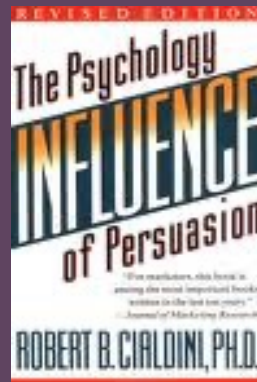
Today's Session



Why?

What?

How?

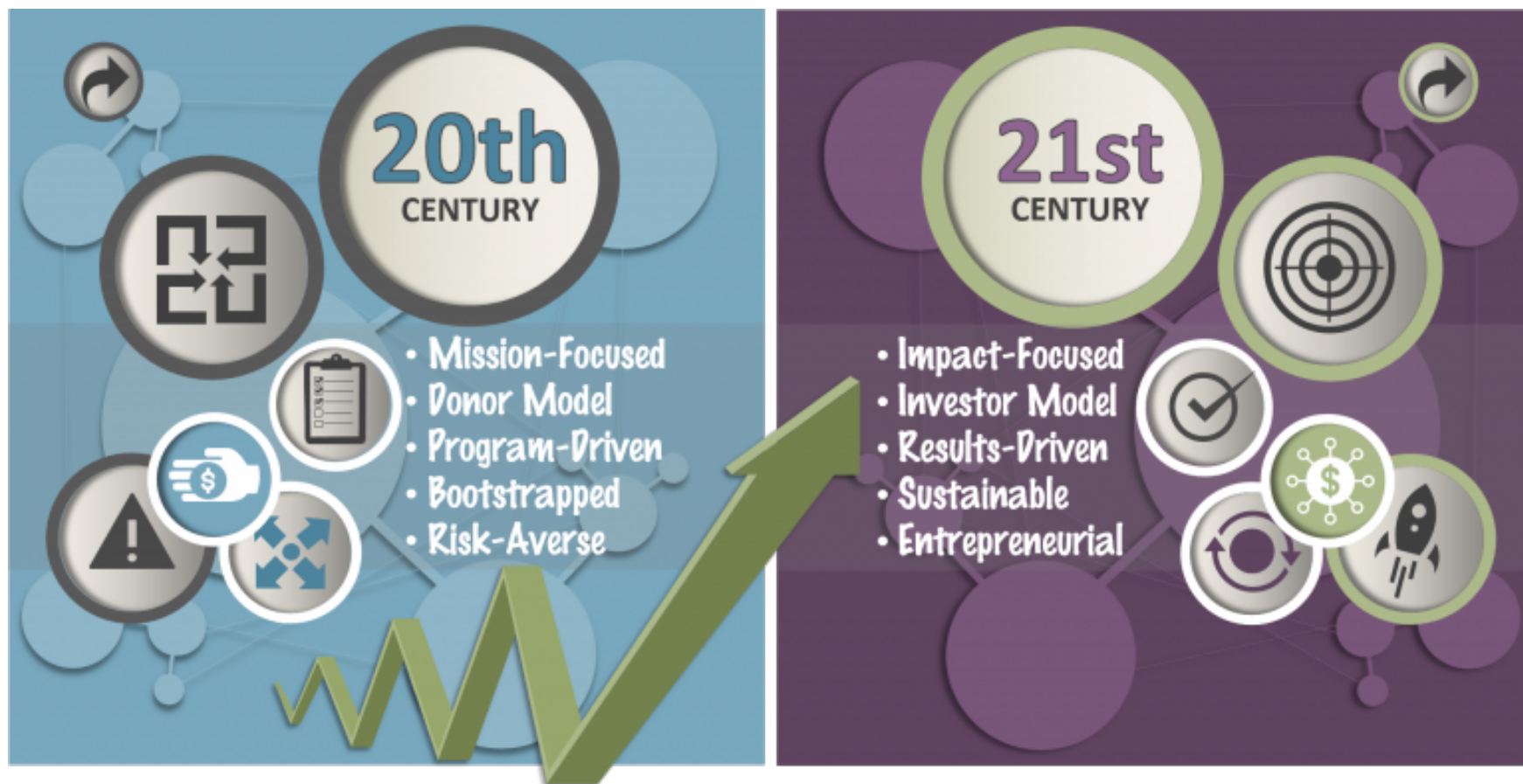




Why?



Where Are Nonprofits Going?



Ego-Thinking versus Eco-Thinking

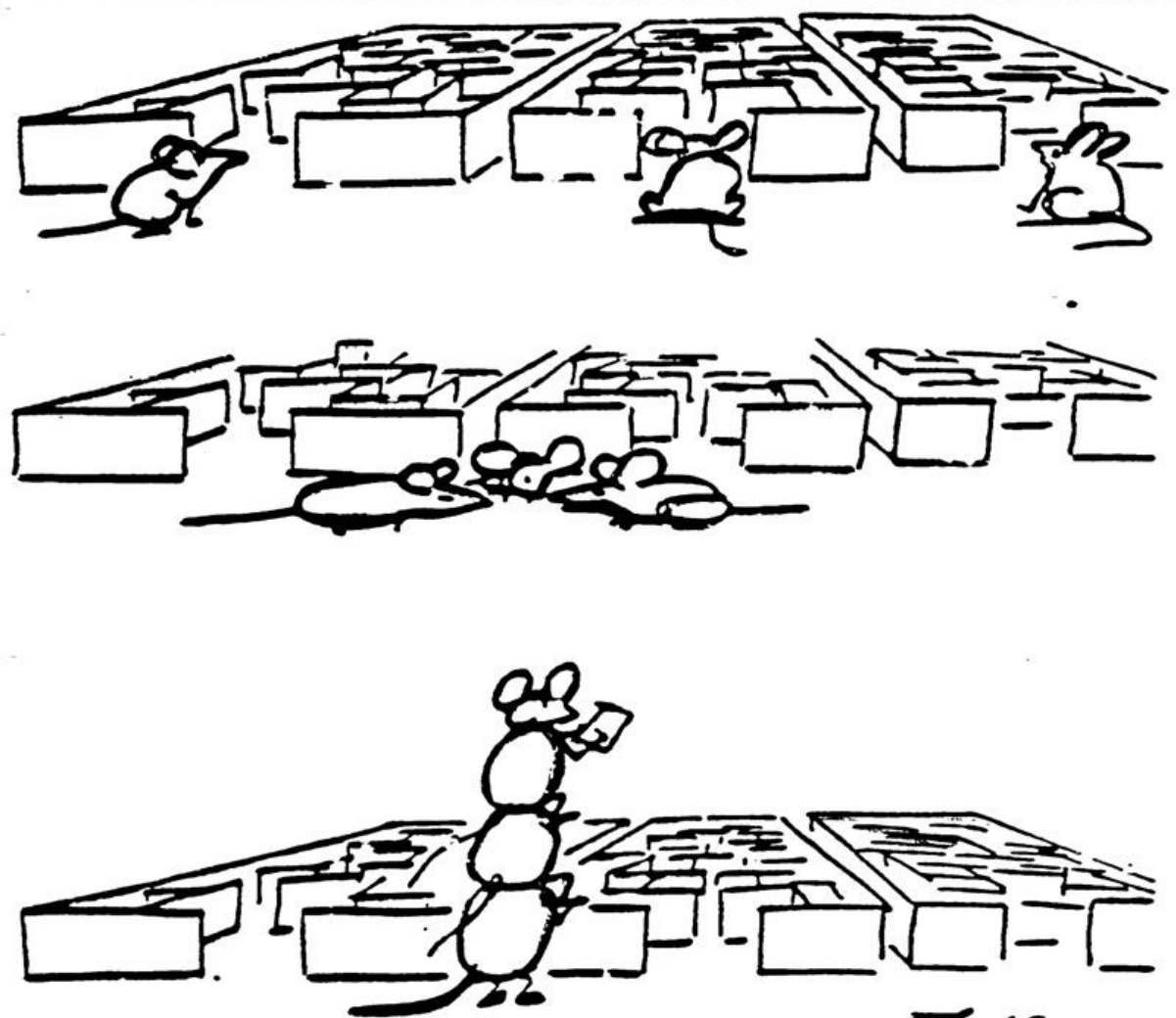


How to Think About Future

Individual Effort

Collaboration

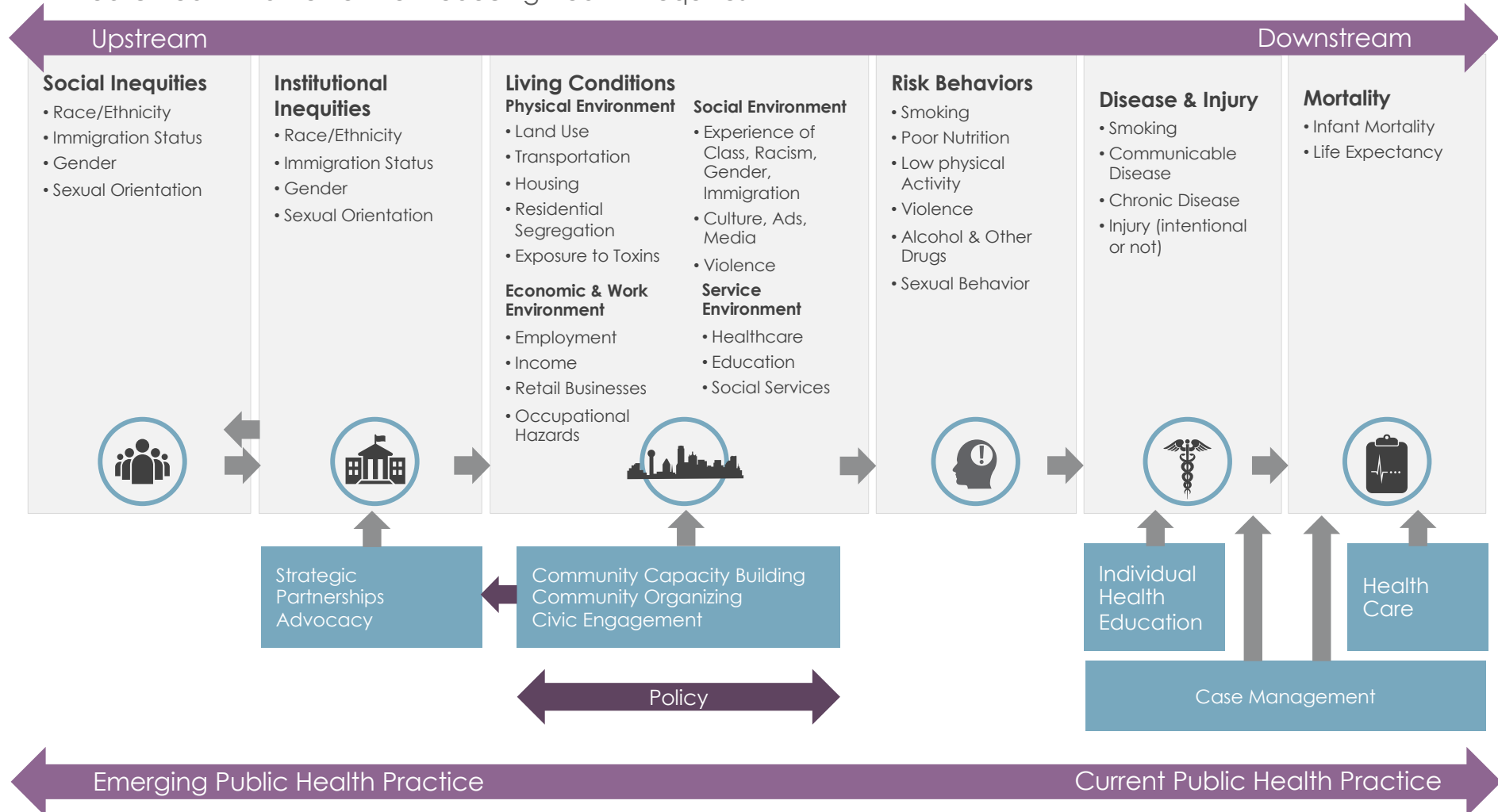
System Change



Moving Upstream

Focused on Individuals as a Function of Systems

A Public Health Framework for Reducing Health Inequities





What?



Collaboration Defined



Two or more organizations...

working together in a **meaningful, well-defined, and deliberate** manner...

by investing **time, energy, and resources**...

to accomplish a set of **shared objectives**...

that are **mutually beneficial** to advancing the missions of the organizations involved, and...

that are **more likely to be achieved** together than alone.

Collaboration



Why is it Important?

- **Critical success factor** in an under resourced & dynamic environment
- **Expected behavior** from our stakeholders
- **Builds scale** given the size and shape of the sector



Why is it so Difficult?

- Takes time and focus
- Often complex, ambiguous, and costly
- Requires different leadership skills
- Competitive-collaborative tensions

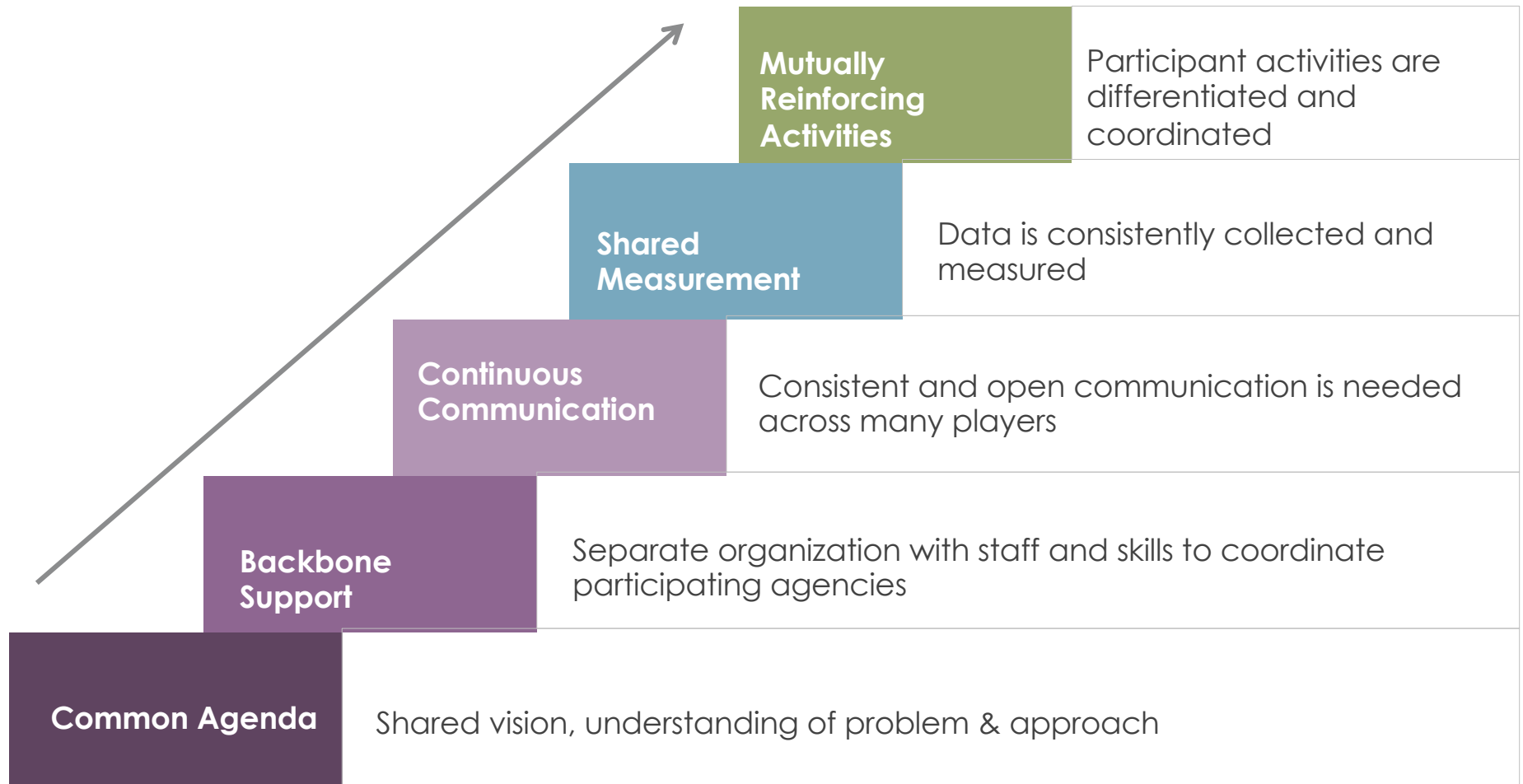
Strategic Collaboration Continuum

Forms Of Collaboration			Strategic Restructuring		
Networking	Cooperation	Coordination	Coalition	Alliance	Integration
<ul style="list-style-type: none"> Share ideas Exchange information Informal communications 	<ul style="list-style-type: none"> Reach agreement on joint goal or activity Share responsibility & decision-making Communicate as needed 	<ul style="list-style-type: none"> Reach agreement on joint need Formalize needs & responsibilities Share risks and rewards Communicate as a joint effort 	<ul style="list-style-type: none"> Agree upon shared means to achieve goal Cultivate vision for success as group Create formal leadership Develop plan of action Share resources 	<ul style="list-style-type: none"> Form a legal partnership with a fiscal lead Used for joint advocacy/programs or shared services Determine clear accountability Share resource formally 	<ul style="list-style-type: none"> Form a new legal structure, including joint venture, parent-subsidary, or merger. Develop new policies and procedures to ensure mission impact and financial sustainability Create new leadership structures Communicate new brand & vision
			Possible Collective Impact Initiatives		
COMMON FOCUS	COMMON GROUND	COMMON PROJECT	COMMON IDENTITY	COMMON STRATEGY	COMMON BUSINESS MODEL
Example: Two nonprofit leaders met for lunch on occasion and share notes on programs, community, or new thinking.	Example: Two social sector leaders – one in nonprofit and another in government – agree to refer clients to each other and share data on success.	Example: Three arts organizations – all with events celebrating XYZ Month – work together on joint marketing and communications.	Example: Many social sector leaders come together to push common agenda and have an agreed upon action plan.	Example: Two nonprofit leaders who have a long-term relationship decide to share staff member or co-locate at facility.	Example: Two or more nonprofits legally merge into a single organization.

Informal Structure & Process

Formal Structure & Process

Collective Impact



Coopetition = Cooperating + Competition



A method that goes beyond the old rules of competition and cooperation to combine the advantages of both.

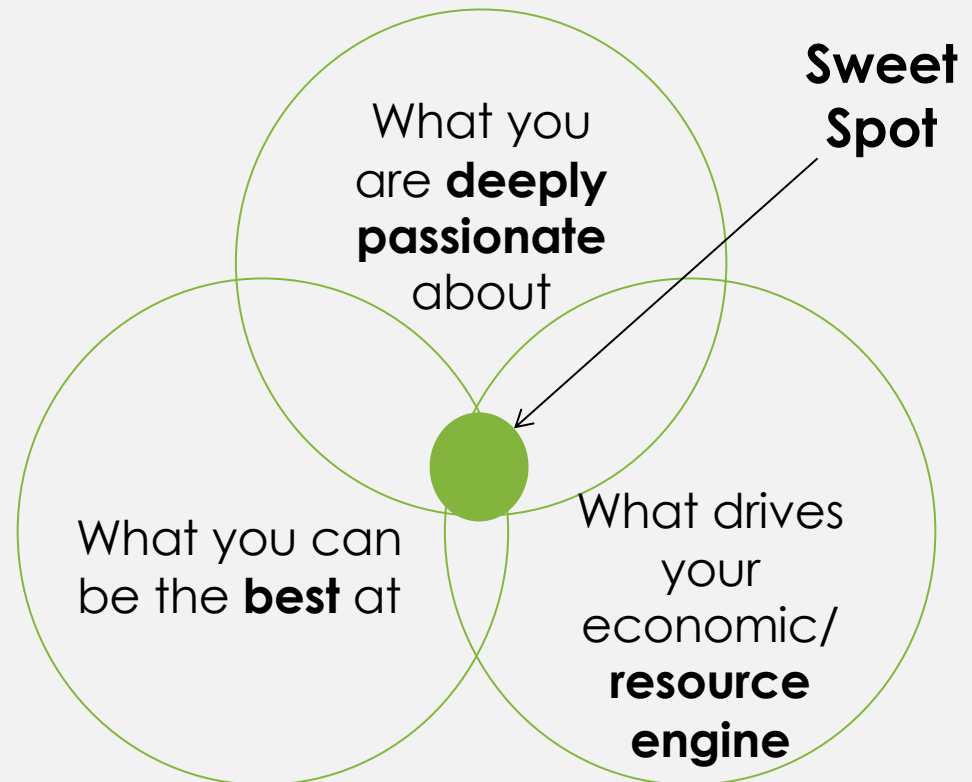
The Hedgehog Concept

The Hedgehog Strategy

The essence of the Hedgehog Concept is to help an organization obtain **piercing clarity** about how to produce the best long-term results, and then exercising the relentless discipline to say “No, thank you” to opportunities that fail the hedgehog test.



Jim Collins, Good to Great



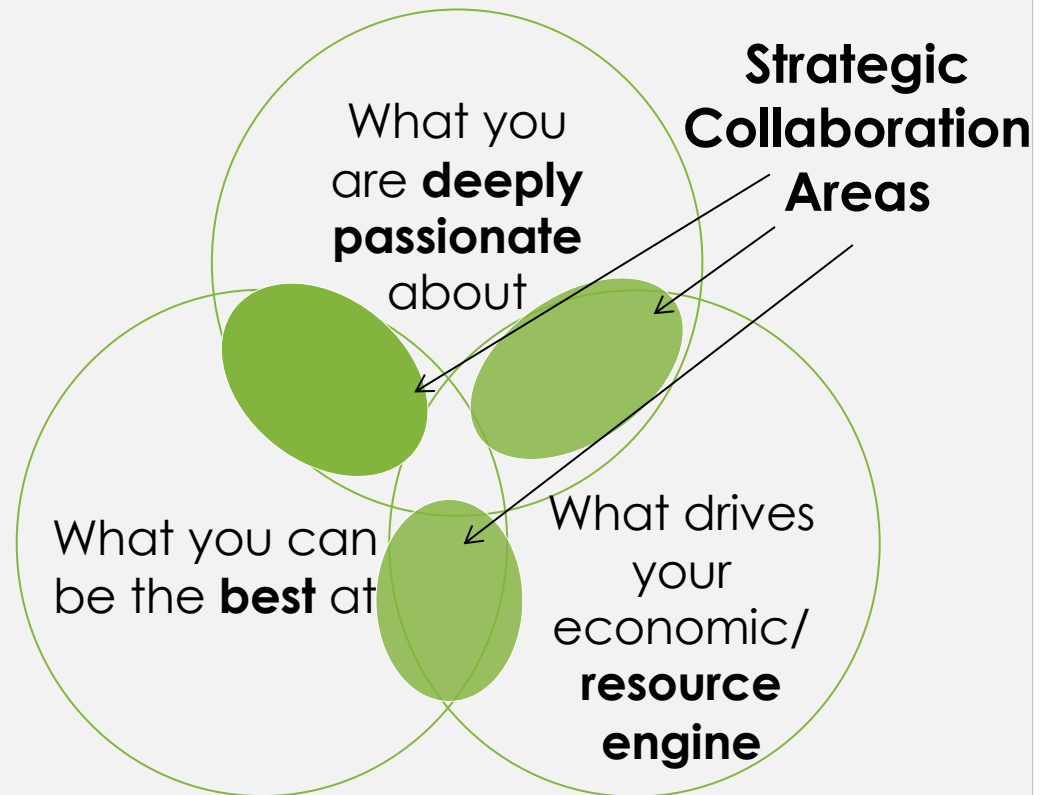
The Hedgehog Concept, Step 2

Strategic Collaboration Areas

Collaboration occurs when people from different organizations (or units within one organization) produce something together by sharing knowledge and resources, building consensus, and sharing the ownership of the final product or service.



James Austin,
The Collaboration Challenge



New Collaborations Take-Home Exercise

STEP 1: Needs Assessment

Think about EXISTING programs/services/activities/roles you do now, BUT may not be going as well as you would like. Consider NEW ideas that you'd like to do but have been just beyond your reach.

STEP 2: Possible Partners

List organizations by need that could help with each need – you can list more than one.

Potential Collaborating Need	Possible Partners

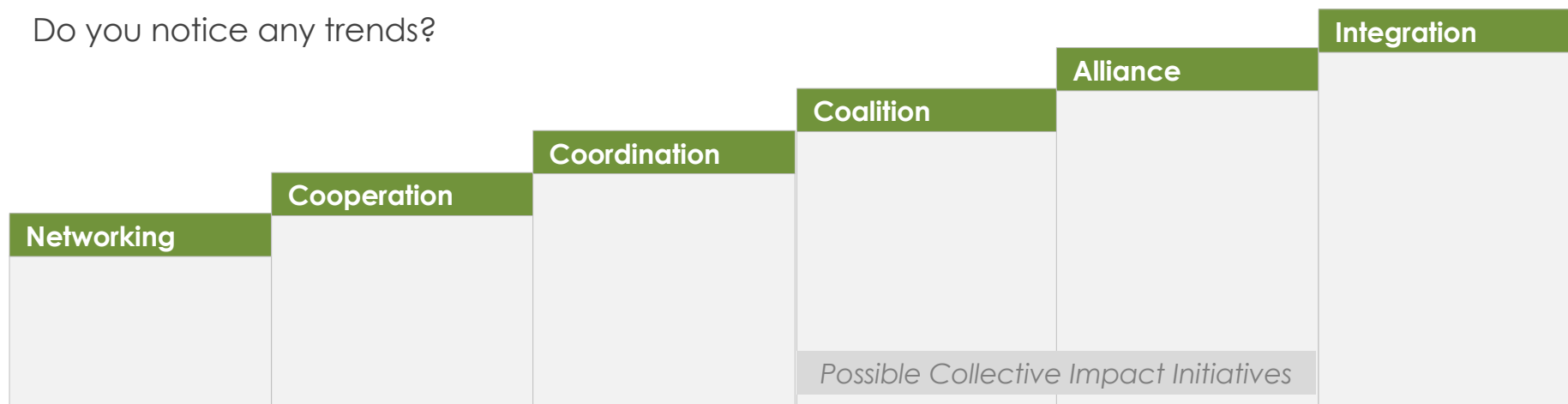
Collaboration Assessment Take-Home Exercise

STEP 1: List All Significant Organizations With Which You Currently Collaborate

Collaborations	Type

STEP 2: Plot Each Collaboration on the Below Strategic Collaboration Continuum

Do you notice any trends?





How?



Our Guide:

The Collaboration Challenge

21st century is “AGE OF ALLIANCE”

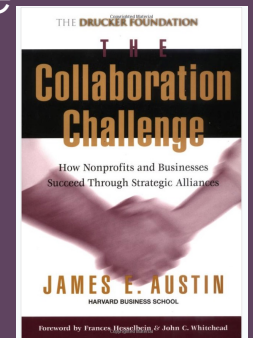


WHY?

Macro-level forces
Economic, political, and
social forces

BENEFITS

Cost savings
Economy of scale
Synergies



Collaboration = Activity + Behavior



5 Steps to Collaboration



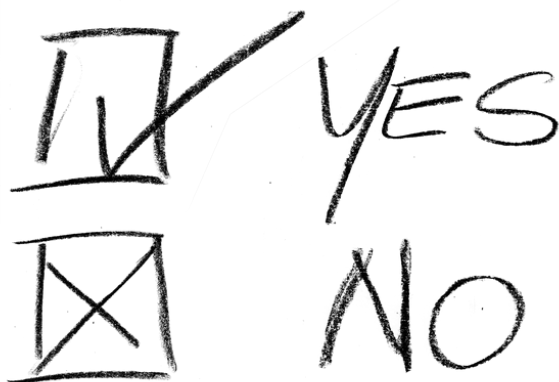
- Understanding strategic collaboration
- Making the connection
- Ensuring strategic fit
- Generating value
- Managing the relationship

5 Steps For Success

Making The Connection

Nonprofit style

match[♥]



PROCESS

- Networking
- Systemic searching
 - Market research
 - ✓ Look for connections
 - ✓ Look for forward/backward integration

GETTING ACQUAINTED

- Designate champion
- "Break bread"
 - Assess for fit and style
- Conduct due diligence
- Engage top leadership

Ensuring Strategic Fit



Strategic Fit

- Clarifying purpose**
 - What are you trying to accomplish?
 - Mission, priorities, & goals
 - Where do your needs overlap?
- Discuss values**
 - Are your values compatible?
 - How do decisions get made? By whom?
- Discuss organizational culture**
 - Entrepreneurial or bureaucratic?
 - Consensus-driven or top-down?

Example: Success Factors

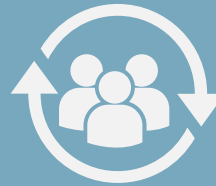
GOALS



What does success look like?

- Success within community
- Success within your organization

PAST EXPERIENCE



What is our collective experience?

- What worked well in past collaborations?
- What didn't work as well?
- What made it successful?
- What made it fail?

OUTCOMES



What impact is most desirable?

- What scale are we interested in – deep or wide?
- What role do we want to play?
- Is the issue well-known or does it need publicity?

Example: Ways of Working

PURPOSE



- What do we want to accomplish? How will we know if we are successful? If we have failed?
- What are the key expectations we have of each other?

COMMUNICATIONS



- What specific meeting guidelines do we want to follow? How should we address conflict or difficult conversations?
- Should we share our work publicly or stay private?
- How should we communicate with funders?
- How should we give feedback?

DECISION-MAKING



- What commitments do we make to each other to complete assigned tasks in a timely fashion?
- Who makes decisions?

Example: Ground Rules







- Let's discuss only the most important factors involved
- Let's not get bogged down by details
- Let's discuss issues as well as uncover root causes and situational barriers
- Let's ask the tough questions of ourselves to resolve any issues
- Let's listen to each other and respect each person's perspective
- Let's look as objectively as possible and not take any issue personally
- Let's analyze the causes of our success as well as our failures
- Let's focus more time on solutions than dwelling in the problems




Example: Ground Rules

COLLABORATION GOALS

GREAT BOARDS= ACTIVITY + BEHAVIOR

-  A goal without a plan is just a wish.
-  Stop the blame game and honor each other.
-  Respect each other's time and talents and build have a strength based approach.
-  Seek to clarify and confirm first whenever possible.
-  Seek first to understand then to be understood.
-  Be flexible.


 GARLAND

Collaboration Goals

GREAT BOARDS = ACTIVITY + BEHAVIOR

Death by Meetings

6 Cs of Energetic Meetings



Clarity
Compelling
Camaraderie
Consistency
Conversation
Check Out

Growing Together



- Conduct shared visioning
- Establish a quick-win
- Develop after-action review
- Discuss budget for collaboration
- Discuss risks to collaboration

Generating Value



Four Dimensions:

- What does value mean to each of the partners? Can you quantify it?
- How do the partners create value for one another?
- How can partners keep a two-way balance in the exchange of values?
- What can be done to preserve and enrich the collaboration's value?

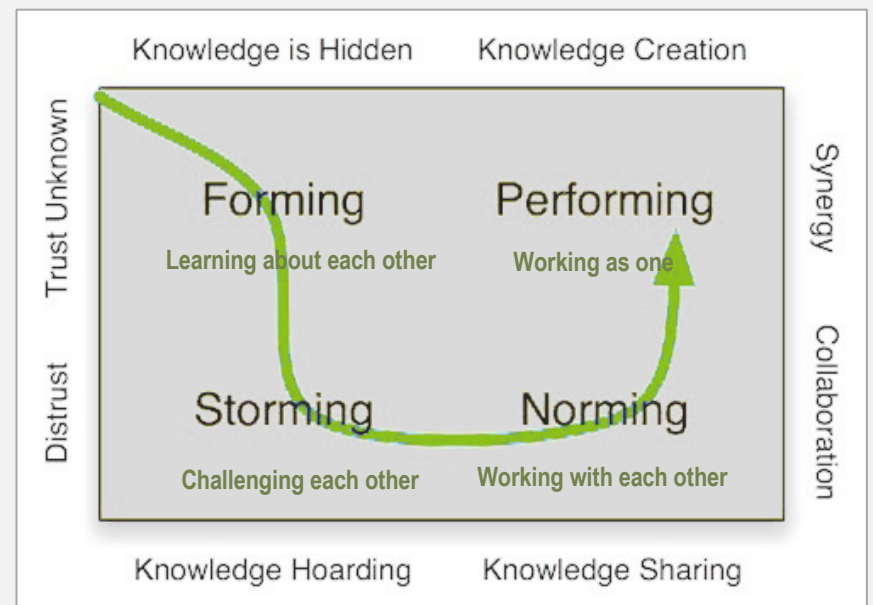
Tuckman's Stages of Development

*Coming together is a beginning,
staying together is progress, and
working together is success.*

Henry Ford



Tuckman's Stages of Development



Managing The Relationship



Keys To Success:

- Trust building
- Timeline
- Focused attention
- Institutionalization
- Effective communication
 - Between
 - Outside
 - Within
- Learning relationship
- Accountability

Speed of Trust



Example: Wilder Assessment

Factor	2014	2015	% Change
Favorable political and social climate	4.0	4.5	13%
Unique purpose	3.5	4.4	26%
Members see collaboration as in their self-interest	3.8	4.2	11%
Skilled leadership	3.8	4.0	5%
Collaborative group seen as a legitimate leader in the community	3.4	3.9	15%
Multiple layers of decision-making	3.6	3.9	8%
Flexibility	3.4	3.9	15%
Ability to compromise	3.0	3.8	27%
Established informal relationships and communications links	3.5	3.8	9%
Appropriate cross section of members	3.6	3.7	3%
Concrete, attainable goals and objectives	3.3	3.7	12%
Adaptability	3.8	3.6	-5%
Open and frequent communication	2.9	3.6	24%
Shared vision	3.6	3.6	0%
Members share a stake in both process and outcome	2.9	3.3	14%
Sufficient funds, staff, materials, and time	3.1	3.3	6%
Mutual respect, understanding, and trust	2.8	3.2	14%
Appropriate pace of development	3.0	3.1	3%
Development of clear roles and policy guidelines	2.8	2.8	0%
History of collaboration or cooperation in the community	2.9	2.7	-7%
AVERAGE	3.3	3.7	10%

Key:

- = Positive indicator
- = Negative indicator

Final Thoughts

Collaboration Commandments

- Thou shalt not use the name “collaboration” in vain
- Thou shalt add value individually and collectively
- Honor thy competition
- Seek first to understand then to be understood



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trendSpotter**

Latest Trends in the Social Sector

socialimpactarchitects.com/blog

CHECK OUT THESE ADDITIONAL RESOURCES:

COLLABORATION COMMANDMENTS

<https://socialimpactarchitects.com/collaboration-commandments>

COLLABORATION Q&A

<https://socialimpactarchitects.com/collaboration-qa/>

COOPETITION

<https://socialimpactarchitects.com/coopetition>

WHY NONPROFIT TEAMWORK FAILS

<https://socialimpactarchitects.com/nonprofit-teamwork/>

ENERGIZE YOUR NONPROFIT MEETINGS

<https://socialimpactarchitects.com/effective-nonprofit-meeting/>

Suzanne Smith, MBA

Founder & CEO, Social Impact Architects

EDUCATION

- MBA, Duke University's Fuqua School of Business
 - Selected as CASE (Center for the Advancement of Social Entrepreneurship) Scholar
- Adjunct Professor – University of Texas at Arlington

AWARDS & HONORS

- "Best for the World" Small Business List – B Corp, 2015-2021
- Tedx Speaker, "Everyone Can be a Changemaker," 2015
- Huffington Post's Top 10 Social Sector Blog, 2014
- Next Generation Social Entrepreneurs Award, 2010

COMMUNITY LEADER

- **Dallas, Texas** – Dallas Commission on Homelessness, Mayor's Task Force on Poverty, Leadership Dallas, Leadership North Texas & Junior League
- Dallas Regional Chamber, Young ATHENA Award, 2014
- Dallas Business Journal's 40 Under 40 Award, 2012
- **Cincinnati, Ohio** – Founder, Flywheel: Social Enterprise Hub



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