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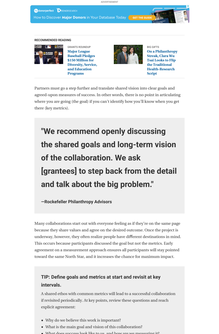
OPINION

The 5 Essentials of Successful Collaborations

By Debi Blizard and Zoë True | JUNE 19, 2021



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In their 2020 Goalkeepers' Report, Bill and Melinda Gates called for a collaborative approach to ending the COVID-19 pandemic. As they put it, "...there is no such thing as a national solution to a global crisis. The longer it takes us to realize that, the longer it will take (and the more it will cost) to get back on our feet."

In addition to battling COVID-19, the world faces many large-scale crises: unprecedented volatility in the climate, America's enduring systemic racism, challenges to democratic elections, and exacerbated economic inequalities.

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Complex challenges like these cannot be solved by a single organization, actor, or governing body. If the 20th century was a century of innovation driven by competition, the 21st century must be the century of collaborative innovation.

Yet, too often, the net result of a collaborative effort repeals less than the sum of its parts. In philanthropy and the private sector, we often find that organizations (or networks) struggle to collaborate in ways that create greater impact. When collaborations do work, there usually is no guide or playbook to replicate strategies and successes.

So, we set out to better understand the mechanisms that help individuals, teams, and organizations work together purposefully. We spoke with more than 30 experts including those working at family foundations, as impact investors, and as philanthropic advisors to uncover drivers and barriers to collaboration.

Based on our interviews, here are the five critical ingredients needed to harness the power of collaboration and achieve full impact.

1. Common Ethos

Collaborations that explicitly define their shared purpose avoid unnecessary friction and benefits from more focused problem solving. Too often we go into collaborations relying on assumed assumptions, only to find out that we do not see eye to eye.

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> "We recommend openly discussing the shared goals and long-term vision of the collaboration. We ask [grantees] to step back from the detail and talk about the big problem."
>
> —Rockefeller Philanthropy Advisors

Many collaborations start out with everyone feeling as if they're on the same page because they share values and agree on the desired outcome. Once the project is underway, however, they often realize people have different destinations in mind. This occurs because participants discussed the goal but not the metrics. Early agreement on a measurement approach ensures all participants will stay pointed toward the same North Star, and it increases the chance for maximum impact.

TIP: Define goals and metrics at start and revisit at key intervals.

A shared ethos with common metrics will lead to a successful collaboration if revisited periodically. At key points, review these questions and reach explicit agreement:

- Why do we believe this work is important?
- What is the main goal and vision of this collaboration?
- What does success look like to us, and how are we measuring it?

2. Committed Relationships

Collaborations exist to overcome challenges, and those built on strong relationships can better face adversity head-on. Without strong relationships, each participant will see a struggle as personal rather than collective and is more likely to feel discouraged or indifferent during a setback or pitfall. Actively building social bonds among collaborators will create trust and a shared commitment to the effort, which makes it easier to take on challenges as a team, and further reinforces relationships.

Sometimes even when collaborators are fully committed to the team and project at hand, a lack of history will cause the collaboration to fail. It may seem easier to collaborate with people who share a similar worldview and proximity, but oftentimes this leads to tunnel vision and groupthink, which make it difficult to see new paths forward.

When we spoke with several large philanthropic organizations, we also heard that entrenched power dynamics can unintentionally stifle communication and collaboration. Your innovation requires uniting those who might not normally join forces. By empowering teams to collaborate across organizational, racial and hierarchical divides, teams can tackle bigger challenges, faster. When shared experiences bring together cross-disciplinary, cross-generational, multi-level thinkers to solve problems, organizations can create the bedrock of healthy collaboration for years to come.

TIP: Create a team that can overcome challenges.

At the start of a collaboration, ask yourself:

- What kinds of challenges are we likely to face and how can we embrace them?
- How can we build a team that can tackle problems with diverse perspectives?
- Are we providing opportunities for collaborators to connect as people, not just as teammates?
- How can we recognize and neutralize power dynamics before they stifle collaboration?

3. Collective Learning

Collaborations that include learning together can build cohesion, challenge bias, and spark innovation. The desire to learn from one another and to pass on a collective knowledge base to future generations is a universal human need, yet it is often overlooked in the space to work efficiently.

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In our interviews, many organizations said that creating opportunities for shared learning is often deprioritized, even though many agreed that it is a powerful way to reach consensus.

Learning together makes collaboration more meaningful, but it can be difficult when individuals have differing levels of understanding around a topic. It is important to find ways to bring less-informed people up to speed while keeping those who are more informed engaged.

Collective learning is as much about the shared experience as it is about the information being transmitted. One interviewee revealed that learning experiences that foster empathy, spark conversation, and build a common vocabulary are far more powerful than everyone merely reading the same report. In fact, the more creative and engaging the medium, the better the information is absorbed. Storytelling is one approach that can bridge knowledge gaps, encourage engagement, and improve cohesion.

TIP: Seek shared learning opportunities to foster innovation.

Learning together can drive solutions to benefit the greater good especially when a variety of perspectives are included. When developing learning opportunities, ask and answer these questions:

- Where do we need to broaden our thinking?
- In what areas can learning together overcome differences and create common ground?
- Whose perspectives have not been heard or not been heard often?

4. Clear Stewardship

Collaborations with well-defined roles and expectations instill a sense of ownership and agency needed for action. Leaders of many different types of organizations said that when responsibility is shared by too many people or roles are ill-defined, nothing gets done. Effective collaborations need someone to lead and drive success — a paid consultant or a staff member. Once the staff is designated, make sure everyone understands their role and feels empowered.

> "Clarifying the 'process' roles — for example, who is going to coordinate and keep us on track; how do we avoid duplication; what unique gifts do we each bring — helps create strong and more lasting impact."
>
> —Walmart Foundation

Appointing a "collaboration steward" (similar to a project manager) to keep everyone on track is critical, especially when key contributors are senior leaders with packed schedules. Expectations for each participant's contribution should not be based on status or tenure but on the unique value and perspective each person can provide. The steward should delegate and define roles and responsibilities, so others feel seen and know how to contribute. The steward acts as the broker, among collaborators, which helps mitigate power struggles and frees the rest of the team members to focus on their responsibilities and feel empowered to their roles.

TIP: Secure the proper resources, human and otherwise.

Identify a "collaboration steward" who will indicate when resources are needed and keep the project moving forward. Make sure the team selects a steward who will:

- keep track of time, budgets, and tasks
- keep the team accountable to the common ethos and metrics
- manage needs and goals for the long term

5. Intentional Processes

Collaborations that develop their own ways of working can maximize productivity and minimize bureaucracy. Too often collaborators establish governance models or processes that someone think they should have, rather than creating a process to help teams commit to their ethos. To get started, consider the ways your team wants to work together, and establish a process that fits your needs. We found that the most successful collaborations tested their goals regularly, assess their progress, make the necessary adjustments, and generate synergy among team members.

> "The family has invested a lot of time and energy in designing policies and processes. I think that is a lot of the reason family members stay together and work together; they are very intentional about it."
>
> —Laird Norton Family Foundation

Being clear about processes, tools, and norms will prepare people for moments of change or transition, whether planned or unexpected. This is especially important when old and new members meet collaborators during a leadership transition.

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In our research, we found examples of entire organizations that dissolved due to poor transitions and a lack of clarity about decision-making processes. A degree of discomfort, awkwardness, or nonplussed during a transition may be unavoidable. After all, now people bring new ideas and methods and sometimes step into unofficial organizational or community norms.

In all collaborations, it is especially important to build in explicit ways to incorporate new voices and ideas, navigate change, and empower younger staff members. This can sharpen strategy, build cohesion and buy-in, and increase the likelihood of long-term impact and an enduring legacy.

TIP: Design processes to adapt with the times.

Each team has a unique group dynamic. If collaborators change because new people arrive or social challenges emerge, set time aside to consider these questions:

- Does everyone know why you use the processes you do, and are they getting value from them?
- Do the current processes meet the needs of everyone involved?
- Which processes are meeting needs within a specific window of time, and which address recurring functions?
- Can we foresee major shifts that may affect the challenge we are addressing, our resources, or our people? Which shifts can we plan for now?

Applying These Principles

To apply these principles, download the worksheet below. We recommend letting all collaborators fill it out on their own, then compare answers, and use disagreements to begin conversation about different approaches with the goal of reaching consensus on your process. You can use this tool at the start of a collaboration or process, at a key moment of change (expected or sudden), or just as a check-up to see how your teams are progressing.

Whether you are coordinating departments within your company, kicking off a new initiative with partners, or navigating a major change in your leadership, it is never too late or too early to be deliberate about collaboration. Use these five Essentials of Collaboration to minimize bumps in the road, maximize impact, and spark solutions.

DOWNLOAD:

Successful Collaborations Worksheet

We welcome your thoughts and questions about this article. Please email the editors or submit a letter for publication.

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