



Funder Collaboration : Making It Work

2012 PFC Symposium Highlights

Session 1: Setting the Stage

Cynthia Gibson, Principal at Cynthesis Consulting, Jean-Marc Chouinard, Vice-President, Philanthropy at the Lucie and Andre Chagnon Foundation and Ian Bird, CEO of Community Foundations of Canada opened the symposium with some thoughtful framing ideas about funder collaboration.

Key Points by Cynthia Gibson:

- There's no formula for how to "do" funder collaboratives but there are some general characteristics: Shared focus, belief that there is more impact in learning/working together, desire to share information and maximize resources, agreed structure and guidelines and a focus on systemic solutions.
- There are different types of funder collaboratives, including learning networks, strategic alignment networks, and pooled funds.
- Collaboratives can be about more than money: also about advocacy; standing and stature; networks and relationships; research and data collection; and expertise and experience.
- Challenges to collaboration include: disputes over control and recognition, the draw on time and energy, institutional shifts and interpersonal tensions.
- What's *not* seen is often the source of most problems with collaboratives: blind spots, power politics, tacit assumptions, "no-go" areas, secret fears or wishes.
- To succeed, a funder collaborative must: stipulate a common goal, develop a joint agenda, develop a "glossary" of terms, get buy-in at all levels and identify concrete steps forward, including exit strategies.

Key Points by Jean-Marc Chouinard

- We need to start seeing more funder collaborations, not just to expand the pool of resources available for some high impact strategic project, but also to expand the areas of expertise and approach that different foundations with different missions can bring to a common and collaborative table.
- Having several different foundations collaborate, each bringing their own area of expertise, can create something very special that is larger than the sum of their respective missions.
- For example, in the Early Child Development Funders Working Group, we have crossed the cultural barriers, found complicity in a real desire to learn and to put in action these learnings gleaned from each other.

- We have been fortunate to be able to develop three large scale collaborations with our provincial government and they are ongoing opportunities for us to learn about the process in which these collaborations are conceived and even more importantly, how to set them up in order to achieve maximum impact.
- Given that the ultimate goal of strategic philanthropy should be to create useful ideas that could influence public policy, knowing how and when to engage governments is critical. In our case, we developed collaborations that involve the sharing of resources, ideas and project governance.
- When contemplating collaboration with government, it is important to consider the following two related questions: Regarding the proposed content of the collaboration, given a particular government's mandate, priorities, political support and timing of the electoral process, when is the best time for a collaborative effort? What should the nature of the collaboration be in order to provide the greatest amount of flexible, creative and bold development for the project with the least risk to the government partner?
- Knowing when and how to collaborate with governments is part political science, part anthropology and part art form.
- As with any and all collaborations, success is based on open and candid conversations at the outset between and among the parties to deeply understand each other's strengths and cultures and to be clear about the nature and timing of the partnership.

Key Points by Ian Bird

- In discussing "funder" collaboration, we should not limit ourselves to the idea of funding...fundors bring more than money to the table.
- Example : Winnipeg Foundation collaborated with Assiniboine Credit Union to make it possible to offer financial services to residents of north end Winnipeg, through a creative combination of assets (\$ and intent).
- Collaboration can be about creating a "frame that matters", paying attention to things
- Example: Vancouver Foundation collaborated with Simon Fraser University to create a public space for civic engagement to combat the major issue it identified as social isolation.
- In collaboration, focus on the spaces in between; between funders and universities, the private sector etc – this may be where collaboration can have most impact.
- There can be issues of timing, size and culture that make collaboration difficult (different time horizons and expectations) so it is essential to have open and regular communication, and time to learn and listen. As well it is important to be very very clear from the outset about what is being sought. Strategies can have different time horizons as long as the goal is mutually shared.

Session 2: Collaboration for Learning

During this session, Margaret McCain of the Wallace and Margaret McCain Foundation, Stephen Huddart of the J.W. McConnell Family Foundation, Johanne Beauvilliers of the

Fondation Dufresne-Gauthier and James Hughes of the Graham Boeckh Foundation shared stories of Canadian funder collaborations in which they are currently involved. The examples of funder collaboration discussed by the panel included the **Early Child Funders Working Group, the Circle on Philanthropy and Aboriginal Peoples in Canada, the Réseau Québécois des fondations pour l'innovation sociale, and the Partnership for Transformational Research in Adolescent Mental Health.**

Session 3: Collaboration for Impact

In this session, representatives of partner organizations working with funder collaborations in different areas (child development, the arts, environment, and community mediation) spoke about the experience of dealing with multiple funders with different expectations and needs. Presentation by three of the four participants (**Lyse Brunet, Normand Beaudet, Claude Lussier and David Moss**) are posted on the PFC Symposium site.

Session 4: The Way Ahead for Collaboration

Al Etmanski of Social Innovation Generation, Liz Weaver of Vibrant Communities, Pat Else of the Ontario Trillium Foundation and Michael Lenczner of Ajah tackled the question of how funder collaboration is evolving, through new structures and approaches that will facilitate more collaborative thinking and creativity in years ahead.

Key points by Al Etmanski

- The “social innovation lab” is a disciplined approach to thinking about how to scale up proven solutions, combining the best of what has worked in the past and what we know works now, operating within a structured “change lab” container.
- This approach responds to very complex social problems that have not yielded to solutions tried so far, e.g. challenging situation of off-reserve aboriginal population in BC or to complex problems with interlocking aspects that don’t lend themselves to easy solutions, e.g. living conditions of aboriginal peoples on reserve.
- The change lab collaboration is a way to take a hard look at how to prevent rather than simply remedy.
- The change lab collaboration is also a way to bring solutions to scale, to ensure impact and durability and to think about how to implement solutions.
- A change lab can bring people to a common understanding of how to develop a good solution – the collaboration brings together an “ecosystem” of people to articulate the components of the solution and to agree on implementation. Change labs pay attention to critical aspects of change-making, focusing on culture as well as strategy. The advantage of this collaboration is that it provides a “fail safe” environment for prototyping/testing and learning together.

Key Points by Pat Else

- The Ontario Trillium Foundation (OTF) is one of the largest funders of collaborative initiatives in Ontario. Since 2005, OTF has invested \$136M in grants to collaboratives

across the province. About 16% of all grants each year are to collaborative initiatives, made in flexible, multi-year fashion.

- Through its Future Fund, the OTF has pursued investments in the sector on the following theory of change: “If we make significant long term investments in a portfolio of innovative initiatives and support them through a high engagement relationship and networking, then we will be a catalyst for transformative change.”
- The Future Fund is now focusing on strengthening the infrastructure for youth social entrepreneurship in Ontario. Through investments in infrastructures of support (incubators, networks, accelerators), the Future Fund intends to achieve a cohesive and integrated economic ecosystem that creates and supports social enterprise opportunities for youth.
- OTF is now sponsoring a Design Lab (similar to Change Lab described by Al Etmanski) for infrastructures that support social entrepreneurship to collectively think through, develop, and refine potential projects. OTF will then introduce youth to funders, investors and sponsors who can help them take their ideas and enterprises forward.

Key Points by Liz Weaver

- Liz addressed three themes: the co-generation of knowledge at ground level in communities; the opportunities and challenges of collective impact work; and the funder role in convening community efforts for social change.
- She suggested that funders could do the following to collaborate and to bring about sustainable change in communities:
 - Recognize the distinctive nature of complex problems and the need for new approaches
 - Form funder consortia to spread the risk of supporting these community-based change initiatives
 - Become partners and co-learners in the change effort; bring knowledge as well as money
 - Fund convenor processes in communities: “full-time glue and connective tissue” that enables broad-based community collaboration
 - Encourage learning-oriented evaluation

Closing Reflections

Tim Brodhead in his closing remarks reflected on some of the key ideas about funder collaboration articulated by participants over the course of the day:

- The need for skilful leadership that alternates between shepherding and championing collaborative activity – both roles are important – it’s a push rather than a pull effort.
- The importance of “taking the time that it takes” – time upfront to clarify goals, time to build trust, time to acknowledge and accommodate differences in cultures, accountabilities, expectations.
- The importance of maintaining flexibility all through the collaborative experience – flex helps to negotiate changes in context, unexpected barriers, surprising outcomes, and players.

- The importance of building in reflection and developmental evaluation, particularly in a long-term collaboration.
- The need for creativity – funder collaborations are not just about money – it’s not the pooling of funds but the pooling of perspectives, ideas, insights – collaboration can be as much about framing a problem as it is about bringing money to the table – it’s paying attention to what matters.
- The best collaboration requires a combination of discipline and ambiguity – clarity about goals, openness to strategies and timing – differences can be sidestepped by having different timing attached to different strategies, as long as the ultimate goal does not vary.
- Collaboration for results requires an unwavering focus and agreement about the goal of the collaboration, from the outset.
- Good collaboration takes expert skills in management and communication – you may need to rethink the people and talents you need to bring to the table as a funder.
- And finally, the importance of articulating an exit strategy or a process for getting to the next phase. Collaboration is not forever and it is better to fix the conditions for the end at the beginning, as part of setting goals and establishing trust.