Collaboration Toolkit

NORTH ETOBICOKE LOCAL IMMIGRATION PARTNERSHIP

2010
Nayar Consulting

ABOUT THE PROJECT

North Etobicoke is a vibrant part of the City of Toronto. Made up of 6 growing neighbourhoods, it has a population of almost 116,000 people. All the neighbourhoods are complex, and their stories are always changing. One constant in every neighbourhood, however, is the strong immigrant presence. There are countless immigrant communities in North Etobicoke, each with its own unique assets, needs and special contributions to make to our city.

The North Etobicoke Local Immigration Partnership (LIP) is a collaboration of local organizations and groups that are working together to develop a settlement strategy. The vision of the NE LIP is to improve immigrants' access to settlement services, education, language training and employment through a coordinated and integrated system. Partners include local residents, community organizations, City agencies, local businesses and more. Ten agencies make up a Partnership Council. There are also 3 workgroups that focus on Settlement and Adaptation, Employment and Labour, and Education and Language Training. All stakeholders are working together to help ensure that North Etobicoke is a community where newcomers feel they can settle, adapt and integrate.

ABOUT THE AUTHORS OF THIS TOOLKIT

Radha Nayar is the principal of Nayar Consulting. She brings over 16 years experience working in women's health centres and other community-based organizations to promote optimal quality of life in diverse communities. She has worked as both a middle and senior leader in organizations. She has led and participated in numerous collaborative efforts between organizations and between sectors. Part of her recent work experience has included United Way Toronto, where she was a member of the Community Investment team that allocated funds to non-profit organizations. There, Radha supported funded agencies to collaborate in different capacities, including developing a grant stream that focused on community development and collaboration. As a consultant, Radha has worked with a number of organizations to build their capacity to collaborate. Radha contributes to her community as a volunteer on community-based boards. She has a Master's Degree in Social Work.

Narina Nagra is an experienced community organizer, facilitator and educator, and has worked in several cities in Ontario including Kitchener-Waterloo, Ottawa, and Toronto. In her capacity at METRAC, Narina managed, coordinated and facilitated safety audits throughout the city of Toronto. She has also facilitated anti-oppression/ anti-racism workshops and consultations for a number of not-for-profit organizations and community groups over the last 10 years, and has worked in several not-for-profit organizations focusing on LGBTQ health, HIV/AIDS, violence against women, labour issues, campus organizing, and the South Asian community.

NORTH ETOBICOKE LIP PARTNERS

Action for Neighbourhood Change
Albion Islington Square BIA
Albion LINC
Albion Neighbourhood Services/Rexdale Partners
Canadian Intercultural Association of Students
CANES Community Care
City of Toronto-Culture Division
Coalition of Rexdale Organizations Serving Youth
Community Development Officer, City of Toronto
Community MicroSkills Development Centre
Councillor Suzan Hall Etobicoke North-Ward 1
Dejinta Beesha
Dixon Community Services
Economic Development, City of Toronto
Horn of Africa Community Development
Humber Institute of Technology & Advanced Training
Immigrant Women on the Move
Iraqi Community Services of Ontario
Job Start
Leave Out Violence
Rexale Community Health Centre
Rexdale Community Legal Clinic
Rexdale Protech Media Centre
Rexdale Women's Centre
Road to Success
Sister to Sister
Social Planning Toronto
Somali Canadian Association of Etobicoke
Somali Tenants Association
TDSB-ELT
The Career Foundation/ Completing the Circle
The Etobicoke North Multicultural Association
Thistletown Community Services
Toronto Employment and Social Services
Toronto Public Library-Albion District
VPI, Etobicoke Employment Assessment Centre
W. Indian Volunteer Community Support Services
Women's Creative Club International
World Service Cargo (Working Skills Centre)
YMCA of Greater Toronto
YWCA-JUMP/LINC/REACH
Youth Empowering Minds

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- The staff of the North Etobicoke LIP: Elizabeth Bethune and Sunny Wang.

- The member organizations of the North Etobicoke LIP.

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INTRODUCTION

Collaboration is on everyone's mind in the non-profit sector and beyond these days. People have always worked together in

> *"Alone we can do so little; together we do so much"*
> *– Helen Keller*

different ways, but the opportunity that collaboration offers to enhance our work in the community has become undeniable. However, understanding how to collaborate is not always easy – in fact, it can be very challenging. The reality is that collaborating well is a skill that has to be learned like any other. Both the non-profit sector and others (i.e. governments, businesses, etc.) are still on that learning journey.

WHY COLLABORATE?

David La Piana, a known collaboration consultant in the United States, says that:

> "No non-profit organization can long survive and succeed in advancing its mission while living independent of other nonprofits. Non-profits gain information, political power, and personal and professional support from other nonprofits. Thus, close working relationships, partnerships, and even joint ventures between non-profit organizations are a fairly natural occurrence." [1]

Advantages of collaboration include[2]:

- Potential for significant cost savings.
- Access to creative, financial, technical and human resources for operations and programs.
- Coming together of diverse stakeholders.
- Decreased duplication of service.
- Enhanced opportunity to influence public policy.

Such advantages have always been powerful motivators to collaborate. However, the landscape of Toronto has been changing, and has brought the topic of collaboration to the forefront. This landscape includes the following:

- Significantly reduced and fragmented funding (both private and public).
- An increasingly corporatized government that results in profound barriers to services, especially for immigrants and refugees whose first language is not English.
- Clients with increasingly complex needs (e.g. war-induced trauma, poverty, homelessness, mental illness and addiction issues) that impact the intensity of work for non-profits.
- The marginalization of the needs of immigrants and refugees in public policy.

One of the responses to these changes has been increasing attention on civic engagement and collaboration as a way to support communities to develop and transform.[3] Slowly, the non-profit sector is coming to understand that, while collaboration has always had advantages, it has become necessary as a way of doing business.

WHO THIS TOOLKIT IS FOR

This toolkit is meant to support the development of collaboration skills and capacity of people working with immigrants and refugees in North Etobicoke. It has been created specifically for the partner organizations of the North Etobicoke LIP. However, anyone can use this toolkit if they are:

- Interested in learning more about collaboration.
- About to enter into a new collaborative relationship, or want to review an existing one.
- Planning to discuss collaboration in general with colleagues and need a place to start.

The information and tools you will find here can be used or adapted by any organization interested in this compelling topic.

HOW TO USE THE TOOLKIT

This toolkit is designed to help you and your organization learn how to be a better collaborator. It offers you information on what collaboration is and how to go about it so you can be more effective in your working relationships.

The toolkit is divided into the following sections:

Section I – The Language of Collaboration: Getting Started on the Journey

This section frames the topic of collaboration, and helps you understand what all the collaboration terms you see really mean.

Section II – Ready, Set, Collaborate!

Is your organization ready to collaborate? Are there any skills you need to develop first? Is the collaboration you are considering the best thing for your organization? For the community? What do you need to think about to decide to go forward or not? This section helps you answers these questions and more...

Section III – The "How-To" of Collaboration

This section outlines the three key stages of collaboration. This is the "how to" of collaboration, and offers you an easy, step-by-step approach to use as you start down the road of collaboration.

Each section will offer definitions, information on best practices, and collaboration tips, techniques and tools. You can:

- Read through to get immersed in the topic.
- Jump to the section that is of most interest right now.
- Use the toolkit in a step-by-step way as you collaboration.
- Share it as a professional development tool.

Appendix

The appendix includes additional information valuable for any individual or group wanting to enhance their ability to collaborate. It includes readings, exercises, checklists and other collaboration tools for you to use on an ongoing basis. It also includes a list of additional collaboration resources for you to enhance your learning even further.

ACTION ITEMS

You will notice this icon throughout the toolkit. It indicates that the information can be utilized as an action step for you and your colleagues.

SECTION 1: THE LANGUAGE OF COLLABORATION -

GETTING STARTED ON THE JOURNEY

> *"Teamwork is the ability to work together toward a common vision…it is the fuel that allows common people to attain uncommon results."* *- Unknown*

This section introduces collaboration, and helps you to understand different types of collaborative relationships. Knowing what kind of collaboration you are engaged in is important so that everyone shares an understanding of what you are doing and why.

There are many terms that are used to describe working with others. Examples of such words include partnership, collaboration, alliance and integration. The work can take many forms, from the most informal agreement to do activities together, to multi-year joint ventures, to mergers that involve substantial resource shifts and changes in organizational structure.[4] Consider the following examples:

- A shooting in a neighbourhood has shaken up its residents. Two organizations decide to hold a joint community forum for people to talk about their feelings and decide what they can do to prevent further violence.

- Clients that go to different child care centres in Etobicoke but meet at a Community Kitchen ask their child care centres to do a joint storytelling program.

- Three agencies that are struggling to maintain their accountabilities to funders decide to hire shared administrative staff.

- Two workers in different agencies that know each other regularly refer clients back and forth.

A continuum that helps us understand different levels of working together is seen on the following page:

	Cooperation	Coordination	Collaboration
Definition	Shorter-term informal relations that exist without any clearly defined mission, structure, or planning effort. Cooperative partners share information only about the subject at hand for mutual benefit and common purpose. Each organization retains authority and keeps resources separate so virtually no risk exists. Cooperation increases efficient use of resources and the ability to meet community needs.	More formal relationships and understanding of missions distinguish coordination. People involved in coordination efforts focus their longer-term interaction around a specific effort or program. Coordination requires some planning and division of roles and opens communication channels between organizations. While authority still rests with individual organizations, everyone's risk increases. Power can be an issue. Resources are shared and made available to participants and rewards are shared.	A more durable and pervasive relationship marks collaboration. Participants bring separate organizations into a new structure with full commitment to a common mission. Such relationships require comprehensive planning and well-defined communication channels operating on all levels. The collaborative structure determines authority, and risk is much greater because each partner contributes its resources and reputation. Power is an issue and can be unequal. Partners pool resources, and share the responsibilities and rewards. Collaboration results in enhancing the capacity of another for mutual benefit and to achieve a common purpose.
Examples	A group of small South Asian serving organizations meet each month to exchange information on service approaches. They update each other on the latest trends in the community, service innovations, and funder information. Two agencies decide to jointly undergo training on how to support people who have been affected by war in their countries of origin.	A group of agencies in a local neighbourhood agree to jointly develop a local handbook for immigrant families on where to go for services and supports. Three agencies that serve women decide to offer a joint information session to clients on an upcoming municipal election and civic rights and participation.	A group of organizations serving the African diaspora come together to address the need for job development and training. They look at long-term plans to develop businesses that will provide jobs. They plan to involve government training services (to help secure grants and provide job training) and post-secondary institutions (for academic and vocational education).

Lower intensity ——————————————————➤ Higher intensity

Lower risk, lower commitment ——————————————➤ Higher risk & commitment

Lower exchange of resources ——————————————➤ Higher exchange of resources

As you move further to the right, the amount of risk, commitment, and resources that participants must contribute to the exchange increases.

Question: Think of examples where your organization is (or has) cooperating, coordinating and collaborating.

Cooperating	Coordinating	Collaborating

The toolkit can be used if you are co-operating, coordinating or collaborating. However, the toolkit will pay special attention to the highest level of intensity of working together – on collaboration. We can define collaboration as follows:

> "A mutually beneficial and well-defined relationship entered into by two or more organizations to achieve common goals. The relationship includes a commitment to mutual relationships and goals; a jointly developed structure and shared responsibility; mutual authority and accountability for success; and sharing of resources and rewards." [5]

Regardless of the kind of collaboration you engage in, there are certain factors that need to be in place for your collaboration to be effective. These include:[6]

- Stakeholders with a vested interest in the collaboration.
- Trusting relationships between the partners.
- Shared responsibility and power in decision making.
- A shared vision and clearly stated activities for the collaboration.

- Open communication.
- Means to implement and sustain the collaborative effort; some sharing of resources.
- Ways to resolve conflicts.
- Shared accountability for outcomes.

We will explore these and other factors in more detail throughout this toolkit.

Case Study: Going From Cooperation to Collaboration

THE COMMUNITY: Tweedsbury has a population of approximately 20,000 people. There is a diverse range of community members in terms of age, gender, ethnicity, race and religion. The community is characterized by higher than average levels of poverty, unemployment and homelessness. In particular, there have been alarming incidents of teen violence developing in the community, and three local organizations that met at a conference decide to meet informally over a coffee to talk about it. They then decide to find out what strategies their staff teams are using in their work with clients and share that information with each other. After a few more coffee dates, their discussion shifts from "isn't this awful" to "what do you think we can do?" They begin seeking out other key leaders in the community who they think might be interested in investigating the problems. Those discussions led to a decision to start to offer joint parent information sessions, where parents can come, receive information about what is happening in the community and get support for their particular situation. The parent's nights are all very well attended. As such, the group decides to move to a new stage in the project, and applies for joint funds for a specialized parent outreach and education program on how to help their children stay off the streets and away from violence. The program also has a youth outreach component and joint youth-parent programming.

THE OUTCOME: Two years later, the group is sharing 2 workers for the initiative, and 11 other organizations within their community have participated in the initiative by pooling resources for various activities. They have also started to see a small but exciting decrease in youth violence their community.

SECTION 2:
READY, SET,
COLLABORATE!

In order to collaborate, it is important to start from the same place, with a shared understanding of what you are going to do and how you are going to do it. Shared understandings mean everyone having the same assumptions, values and practices to focus their efforts in the same direction. Please see page 59 in the Appendix for a framework that outlines the key elements of collaboration. These elements form the basis of the various sections of this toolkit. When each one is considered, then a strong foundation for collaboration will be laid.

We know that collaboration is necessary in today's world. But how ready are we to collaborate? What are our unique strengths and areas of growth? Do we know what we bring to the collaborative table? Who are we best suited to collaborate with, and why?

Before you begin, it is a good idea to think about your organization and its readiness to collaborate. Failing to do so can create significant issues down the road.

This section will offer information to help you understand:

1. Your readiness as an individual and as an organization to engage in collaboration.

2. Your strengths and areas of growth as a collaborator.

3. How to choose who to collaborate with.

"Individually, we are one drop. Together, we are an ocean."

Ryunosuke Satoro

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ASSESSING YOUR ORGANIZATIONAL READINESS

BEFORE YOU BEGIN – Assessing Your Own Personal Readiness

Collaboration is only as good as the people who are involved in it. Before any assessment of your organization, it is important to check in with yourself. Even the most experienced professionals will have certain areas for growth when it comes to collaboration. Keep in mind that it may be difficult to answer some of these questions. More work may need to be done on your part, either before or during the collaborative relationship.

1. Why am I interested in collaboration? What is my motivation to be involved?
2. Do I have the time it will take to be a productive member?
3. Do I value teamwork and shared responsibility?
4. What skills and resources do I bring to groups?
5. Are there any work or personal issues that might affect my involvement (e.g. conflicts of interest, time constraints)?
6. What fears or insecurities (if any) do I have about working with any particular individual or organization?

Use these questions to decide if there are any issues regarding your own interests and motivation to collaborate. It is better to honestly assess these areas beforehand rather than after collaboration has been established.

João Almeida Das Rosas (2009) states that readiness to collaborate can be measured along 3 key lines:

1. <u>Preparedness to collaborate</u> – This is your organization's behaviours and traits in working with others. It includes openness to new ideas, ability to work through conflicts and understanding when to lead and when to follow. Preparedness also relates to capacity to contribute human and other resources. Traits of a prepared organization include:

- Leadership has positive feelings about collaboration.
- There is a history of successful collaboration.
- Funders are interested in having the organization collaborate.
- There is technological capacity to partner.
- Staff has workload capacity to collaborate.

2. <u>Skills in collaboration</u> – Collaboration requires both people to have both "hard" and "soft" skills. Examples include:

Soft skills:	Hard skills:
- Optimism - Common Sense - A Sense of Humor - Integrity - Motivation - Empathy - Leadership - Listening	- Program planning - Grant-writing - Evaluation - Public speaking - Conducting research - Running programs - Facilitating meetings - Mediation Skills

Key to success is an organization's ability to balance both hard and soft skills.

3. <u>Willingness to collaborate</u> – This involves assessing beliefs about the expected outcomes the collaboration may provide, fears about losing organizational autonomy and feelings of losing (or gaining) control in relationships with others.

Before embarking on any in-depth collaboration, agencies should ideally spend 6 to 12 months building a culture of collaboration. Even the most informal collaboration requires some reflection before going forward. Examples include:

- Implementing ongoing learning and reflection activities.
- Providing training to staff on collaboration.
- Pursuing funding to do collaborative work.
- Piloting small projects to increase tolerance for some risk in collaboration.
- Exploring how people from different cultures in your organization understand the concept of collaboration.

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Case Study: Are You Ready?[7]

Two government departments were working with a small urban area to deliver health services in collaboration with several community-based health care agencies. Although everything seemed to be in order, it was difficult to get commitment from the health care workers who were going to provide the services. What hadn't been taken into account was the fact that the health care workers were not used to working in a community context. Most were still adjusting to being in an agency rather than the more familiar and structured environment of a hospital. They needed time to make the transition into the role of community contractors before they could be active in a partnership. Although the managers of the agencies and the two government departments were ready, the people who were actually going to do the work were not.

The collaboration could not be developed until the health care workers were provided more in-depth training and a chance to dialogue about their new roles. It took a bit of time, but it was worth waiting for, as they brought a whole new set of attitudes and ideas into the partnership, based on their experience and knowledge of people's needs.

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WORKSHEET #1:
ASSESSING READINESS TO COLLABORATE

This worksheet[8] will help you put together a "snapshot" of your organization so you have a better understanding of where you are and where you want to go. There are no right or wrong answers! Recognize that some of the questions are subjective.[9]

Who explores these questions is important. A critical misstep is to only engage the senior leadership in feasibility assessments on collaboration. This is problematic, as the majority of collaboration activities are actually implemented by front-line and management staff, and received by consumers of service. Involving those groups in answering some of these questions is a good way to inform the collaboration process and secure their support. Take this worksheet to the appropriate team meeting(s) for discussion. Then use it to start to expel where you need to develop as a collaborative organization.

1. What resources (e.g. money, materials, space, equipment) from the organization might be available for the collaboration?

2. How will the organization support any representative in the collaboration (check all that apply)?

    ❑ Delegating some duties to other staff for a period of time
    ❑ Providing support to debrief as needed
    ❑ Professional development support
    ❑ Other _____

3. What are the ways that your organization has demonstrated its reliability in collaboration in the past?

4. Does the organizational culture support collaboration? In what ways?

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5. Does the organization still need to build capacity to collaborate (i.e. put the proper technology in place, understand implications when systems are integrated with another organization, train staff, engage clients and stakeholder in the discussion further)?[10]

6. As a whole, how supportive is your Board to the idea of participating in collaboration?

   ❑ Supportive, can't wait to get going
   ❑ Supportive, but has a few concerns
   ❑ Somewhat sceptical, but open to exploring
   ❑ Don't understand it as well as they need to
   ❑ Really don't like the idea
   ❑ Adamantly opposed to the idea

7. What specific policies does your organization have in place to support collaboration?

8. As a whole, how supportive is your staff to the idea of participating in collaboration?

   ❑ Supportive, can't wait to get going
   ❑ Supportive, but have a few concerns
   ❑ Somewhat sceptical, but open to exploring
   ❑ Don't understand it as well as they need to
   ❑ Really don't like the idea
   ❑ Adamantly opposed to the idea

9. What collaborations have you, your staff, and/or your Board dreamed about? You are limited only by your imagination here—you don't have to be practical and you don't necessarily have to have any of the components in place.

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10. Who inside the organization are your "collaboration champions"?

11. Do you have any potential, unfriendly, or friendly competitors? Describe them.

12. List all the reasons you shouldn't engage in collaboration. What do you see as potential drawbacks or areas of concern?

13. What are the issues and trends to watch? How do they either support or inhibit your prospects for success? For example:

- ❑ Business and economic changes in Toronto
- ❑ Political developments, particularly at the municipal level
- ❑ Technology innovations in the non-profit sector (e.g. blogs, webinars, wikis)
- ❑ Demographic changes in North Etobicoke
- ❑ Funder activities and patterns
- ❑ Other groups in North Etobicoke doing work that is relevant
- ❑ Cross-sector alliances between non-profits, business, and government in North Etobicoke
- ❑ Social issues of greatest concern to potential partners
- ❑ Other _____

14. How will collaboration benefit the organization? When will the organization benefit from the collaboration? Is it soon enough, or too far off in the future to address urgent issues or to warrant spending financial resources today?

15. Will the collaboration have any effect (positive or negative) on normal business? Will it impact other key priorities?

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IDENTIFYING WHAT YOU BRING TO THE COLLABORATIVE TABLE

In the North Etobicoke LIP, all participating organizations bring valuable assets to the table, as well as various needs. By identifying these things, you can start to see where collaborations can be created to help meet the goals of the local settlement strategy.

"Unity is strength... when there is teamwork and collaboration, wonderful things can be achieved."

- Mattie Stepanek

WORKSHEET #2:
YOUR ORGANIZATION'S ASSETS

The following worksheet[11] gives organizations the chance to identify strengths and areas for growth in collaboration. Use it to be clear on what you can offer as you start to collaborate :

1. Identify and then describe your organization's assets that you could bring to a potential collaboration. Feel free to add additional assets.

a. Tangible assets

☐ A unique program or service that reaches a distinct audience or responds to an important social need in North Etobicoke

☐ Publications that are sent to diverse communities

☐ A newsletter, magazine, or periodical that can send out information broadly

☐ Research material on a problem or issue facing immigrants and refugees

☐ Contact with individuals and other organizations either in or outside of the LIP who are experts on particular issues

☐ Expertise in collaboration among your staff, board members, and others in your organization

☐ Expertise in other areas among your staff, board members, and others in your organization

☐ Access to well-respected community leaders

☐ Sustainable funding

☐ Access to facilities

☐ Insurance

☐ Access to legal advice or support

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- ❑ Equipment (office, maintenance, special program-related equipment)
- ❑ Information management systems and IT facilities
- ❑ Diverse volunteer opportunities that can engage community members
- ❑ Capacity to fundraise
- ❑ Other tangible assets (please list): _____

  _____

  _____

b. Intangible assets

- ❑ A positive reputation and credibility with:
  - ☐ Other non-profit organizations (which ones?)
  - ☐ Clients, participants, community members
  - ☐ Staff and volunteers
  - ☐ Collegial, non-competitive organizations (which ones?)
  - ☐ Government agencies (which ones?)
  - ☐ Media (which ones?)
- ❑ An ability to deliver high quality programs at a low cost
- ❑ Special access to different sectors of our community – perhaps because of special skills such as a multilingual staff or funding to serve particular groups
- ❑ Visibility and high public awareness of the organization (could include a compelling logo or slogan that people associate with the organization)
- ❑ Knowledge of, and access to, the client base we serve
- ❑ Opportunities to showcase and promote our partners
- ❑ Other intangible assets (please list): _____

  _____

  _____

2. Describe your organization's personality. List three traits people think of when they hear about your organization.

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3. Who are your allies/supporters? Think of all the people who wish you well along with any pluses or minuses inherent in these connections. It's good to have friends in high places, but sometimes they come with risks!

    a. Major funders or partners:

    b. Board Members:

    c. Members/Volunteers:

    d. Other groups:

4. What is the biggest challenge your organization currently faces? How does that challenge impact collaboration?

"Strength is derived from unity. The range of our collective vision is far greater when individual insights become one."

— Andrew Carnegie

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DETERMINING WHO YOU SHOULD COLLABORATE WITH

Once you have established your organization's readiness to collaborate, and your strengths and areas for growth, you now need to determine who you should be collaborating with! This step cannot be understated. It is critical to identify the organization(s) it would be most strategic to work with. One of the biggest issues with collaboration is that groups decide to work together without having considered if the partners at the table are the right fit for them, or for the issues at hand. You won't always get the chance to choose your partners, but you can do it more often than you think.

Unfortunately, there is no master checklist for collaboration development as every situation is unique. It takes a thorough internal process to identify the right partner(s). The following steps outline how to choose and secure partners in a collaborative venture.

_____

"The failure of hierarchies to solve society's problems forced people to talk to one another---and that was the beginning of networks – John Naisbit

_____

Step 1: Initiate the discussion. [12]
Determine the needs of your organization and your community. The findings can then be used in discussion with potential partners.

When you begin to think about forming partnerships, consider this question:[13]

- "If we only had _____, we could _____."

For this step, gather a group of people who have a good understanding of your organization's strengths and weaknesses to begin the conversation. Examples of answers could be "*If we only had Spanish-speaking staff, we could offer our clinic's services in the local Hispanic community*," or "*If we only had another basketball court in our neighbourhood, we could set up a basketball league for our youth*." Be clear about your problem and what would solve it.

Use the following questions to initiate the discussion:

- Are there some desired outcomes for community well-being that we have been unable to achieve on our own?
- Are there strategies that we would like to implement but need more resources?
- In what ways is a system-wide effort important for accomplishing our organizational mission?

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Step 2: Identify potential members to determine who shares your interest in the issues you have discussed.

A way to identify potential partners is to begin to discuss key factors that are needed in your partners for the collaboration:[14]

- ❑ Representation from certain sectors (e.g. non-profits, private sector, government agency or program)
- ❑ Organizations of a certain size – small or large
- ❑ Particular experience or expertise, including skills, technical capabilities, or assets that are missing
- ❑ Proven leadership in an area
- ❑ Proven relationships with critical stakeholders (e.g. city or provincial politicians, funders)
- ❑ Organizations with credibility in the community
- ❑ Organizations that are known for getting along with others
- ❑ Organizations with a shared value base
- ❑ Organizations with mission alignment (remember that an agency aligned closely in vision may mean competition for resources)[15]
- ❑ Organizations you have a positive collaboration history with

Partners will not remain in collaboration projects where their self-interest is not being met, or if they feel they are providing an unfair share of the resources or effort. Understanding what you have to offer that would interest another organization is the foundation for identifying and attracting the right partners.

Where can you look for potential partners?

1. Do you have existing partners where you can expand the relationship? Could they introduce you to someone else?
2. Are there individuals who know your organization who could introduce you to other like-minded people?
3. Do you have individuals in your organization who can introduce you to others?
4. How is diversity being considered in who is being invited (i.e. representatives of various diverse communities – ethno-racial communities, the LGBTTQ community, communities of people with disabilities, etc.)?

Remember to think about the size of your collaborative group. Ideally, you should aim for no more than 15 members in any given group in the beginning, in order to schedule meetings and give everyone the chance to be heard.

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Step 3: Invite participation
Gather potential partners for a dialogue on the possibilities of working together.

In this step, potential partners meet to decide whether to proceed with some form of collaboration. You personally contacted each person and have now extended an invitation to attend a meeting with all potential partners to discuss the possibilities.

At this meeting, you and your partners need to explore the following:

- A general sense of what the problem(s) is, and why it is happening
- The shared understanding of potential benefits to the organizations and the community for working together
- What kind of potential commitment of time and resources may be required as the project unfolds, and if each potential partner can commit
- Who brings what:
    - Expertise
    - Resources
    - Connections
- If the political climate is favourable for this venture
- The implications to others doing similar things in the vicinity of the collaboration

Cover this list deliberately since, before this meeting, the initiator of the process is the only one who "owns" the vision in the project concept. By the end of the meeting, all partners should be clear on if they want to proceed, have a general sense of the work and have broad ownership in the collaboration and the project.

Lastly, collaborations should consider who else could be at the table. Establishing a core of partners at the start quickly brings stability to the collaboration. Key strategic partners that all organizations have a relationship with or vested interest in may play an important role in getting the collaboration off the ground. Funders might be invited into certain points in the process for strategic relationship building, and to get funds for the project. Academic institutions and think tanks can be invaluable to evaluation.

> *It is important to engage users of services that you represent – immigrants and refugees in North Etobicoke. Communities can be engaged and invited to be part of the collaborative group, or asked for their feedback on what the group is planning to do. Use the avenues that you have in place to engage service users (e.g. through services, satisfaction surveys, etc.).*

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North Etobicoke LIP Collaboration Toolkit
Section 2: Ready, Set, Collaborate!

The Southeast Toronto Conservation Coalition: A Case Study

With the aim of mobilizing citizens in support of alternative energy sources and environmental conservation, a leader of a mid-sized agency coordinated an effective collaboration consisting of groups with widely varying missions and beliefs: labour unions, environmental organizations, low income advocacy groups, pro-conservation, electric utilities and civic groups. The coalition centrally designed a mailing that left room for branding on the part of each organization, making it readily identifiable as having been sent from the organization with which the recipient was associated. The mailing was sent to each organization's stakeholders with prepaid reply cards offering different proactive commitment options. All of these cards were returned to the coalition where answers were entered into a master database so that follow-ups could be completed and suitable individuals could be added to other member organizations' volunteer activist development lists. Although many of the partners in the coalition were not ideologically aligned, they shared an overlap in operational needs and were thus able to collaborate effectively to meet a common goal. The end result was achieved more efficiently than if they had attempted to work in isolation from each other.

Pitfalls to Avoid:

- Casting the "stakeholder net" to a narrow group of individuals or organizations.
  While well-established relationships clearly are the foundation of a successful partnership, new community collaborations may benefit from networks beyond the traditional organizations and individuals with whom they often work with. Look outside the usual players!

- A representative of an organization is not in a position to commit resources or make policy decisions on behalf of the organization.

- Engaging individual stakeholders with expectations and motivations that are inconsistent with project goals.

- Taking the process of engaging potential partners too far, for too long.
  Consider when to consult broadly and when to take action as a core group

- Not taking steps to ensure that smaller organizations will not be "lost in the mix" (e.g. accessible meeting times, acknowledging diverse assets).

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North Etobicoke LIP Collaboration Toolkit
Section 2: Ready, Set, Collaborate!

SECTION 3:
THE "HOW-TO" OF COLLABORATION

It is time to get into the nuts and bolts of collaboration. You have considered your own organization readiness and capacity to collaborate. A group of organizations have gathered to discuss an issue and have decided to work together. The next steps are to plan the collaboration. This section helps you with how to do that, breaking the work into three key stages:

Stage 1:

- Building trust.
- The issue of power.
- Rules of engagement.

Stage 2:

- Creating a shared understanding of the problem.
- Articulating shared vision, values and outcomes.
- Scoping activities for collaboration.
- Clarifying governance and management of the collaboration.

Stage 3:

- Conflict Resolution.
- Liability & Risk Management.

"The secret is to gang up on the problem, rather than each other."
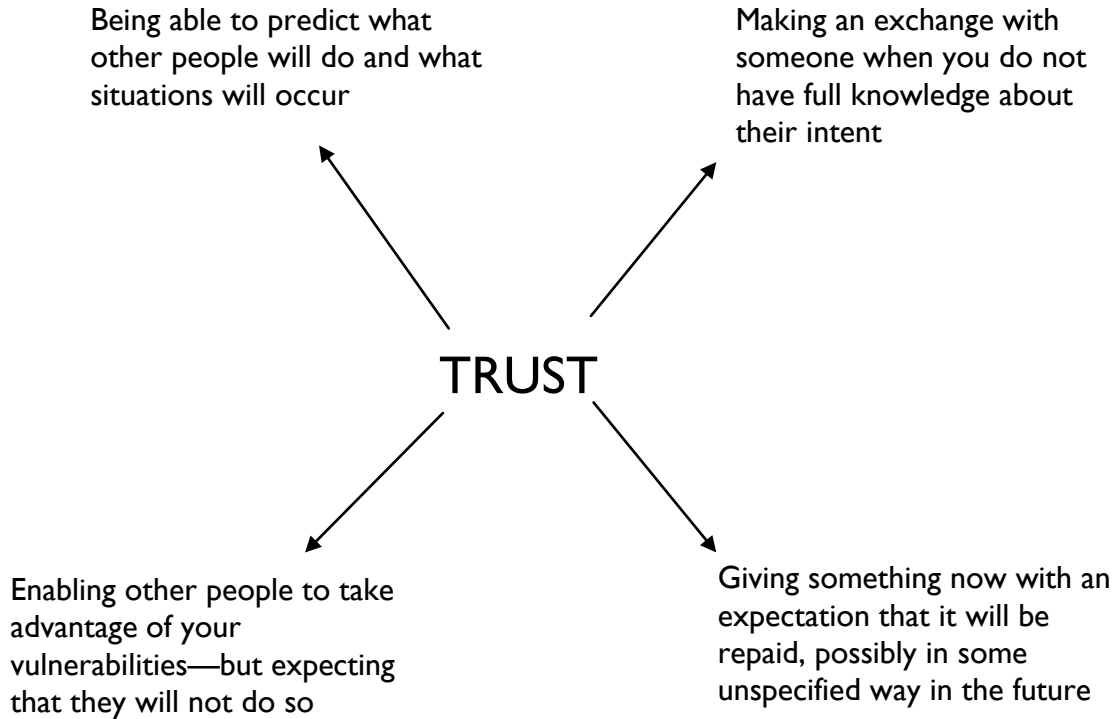*- Thomas Stallkamp*

BUILDING TRUST

As with any relationship, collaborative partners must be able to feel they can trust one another. Without trust, projects can get derailed or never get fully off the ground. Coupled with trust is the need for open communication. When tough things need to be said, the openness must be there to say them and have them be heard:

"In a sector where compensation is not a primary motivator, independence and autonomy are much cherished rewards…One way to defuse this potent issue is to ask [people] to detail their concerns and fears… [they] should be encouraged to articulate their worst fears for their organization, for their constituency, and for themselves…these discussions will reveal the motivations of the parties…and thereby begin to build mutual trust, an essential foundation for a successful outcome in any [collaboration] process." [16]

Although trust is something we *feel* toward others, it is actually both emotional and logical. Here are the 4 key dimensions of trust – do your current collaborative relationships reflect these dimensions?[17]

Being able to predict what other people will do and what situations will occur

Making an exchange with someone when you do not have full knowledge about their intent

TRUST

Enabling other people to take advantage of your vulnerabilities—but expecting that they will not do so

Giving something now with an expectation that it will be repaid, possibly in some unspecified way in the future

HOW TO BUILD TRUST

At the beginning of any collaboration, someone needs to take that first step and try to build trust. Here are some helpful tips[18] you can use to get going:

Listen fully
Allow yourself to listen completely to others. Listening leads to understanding which causes trust. A person may wish to share something in confidence with you. Violation of confidence is a quick way to lose trust.

Appreciate others
Learn how to appreciate others so that you encourage mutual trust. Give credit where credit is due. Avoid the unmitigated disasters when team members feel that someone else is taking credit for their work.

Be reliable and consistent, keep your commitments
It does not matter if the commitment is small or big. This includes delivering on time, or managing resources and budget. Avoid making others feel: "We don't know if (s)he will come through this time."

Tune into your vulnerabilities
When we are extending trust, sometimes things can happen which leaves us feeling betrayed. The emotional response is shock, fear, anger. The mental reaction is a "never again" decision that affects trust. These decisions are logical, but highly limiting when it comes to working with new people.

Support others
When your expertise is needed, find ways to accommodate even when your own commitments and constraints are demanding. This could be as little as offering an hour for guidance, or reviewing and commenting on other's work.

Admit mistakes
Don't blame others. We all make mistakes. They are an opportunity to build or regain trust, but the first step is to admit it and then seek a corrective solution through which you can demonstrate sincerity and earn trust back.

Create mutual accountability
Accountability is not a negative but a way of determining what has and has not been achieved. Creating mutual accountability, not only for what is achieved individually but as a collective, is a vital part in building trust.

> *See page 63 in the Appendix for some trust building activities you can do with your collaboration partners*

North Etobicoke LIP Collaboration Toolkit
Section 3: The "How-To" of Collaboration

THE ISSUE OF POWER

Note: This section focuses on organizational power. However, personal power and privilege plays a large role in how organizations acquire power. It also plays a large role in the success of any collaboration. For the opportunity to read more about personal power and privilege, please see pages 65-69 in the Appendix.

Power, self-interest and resources are three factors fundamental to collaboration. Before collaborations are established, it is important to understand who has power or where it is shifting, what personal or professional interests will be served and what resources will be needed for the partnership.

> *It is not our differences that divide us. It is our inability to recognize, accept, and celebrate those differences.*
> *- Audre Lorde*

Acknowledge Power
Collaborations are about power: individual power and collective power. For some, the word power has a negative connotation and implies control, force or undue influence. Some think of power based on gender, race or rank. Power also has a very positive side in the sense of strength and wisdom. Power is always present and is rarely equal. It is important to recognize this fact as you consider collaborating. A successful collaboration values and openly acknowledges the different types of power that each individual or organization brings. By acknowledging it, the collaboration is then able to deal with any issues or conflicts that arise from the use of power.

Disclose Self-Interest
Collaborations serve our self-interests, whether on a personal or professional level. There is always something in it for us, and knowing what it is ahead of time helps build collaboration. Self-interest is the primary motivation for people and should be acknowledged. What each individual may gain as a result of the collaboration will vary, but it could include things such as recognition, financial reward, connections, advancement, influence or inclusion. We should encourage discussions about how a potential collaboration serves our own personal interests as well as those of our organizations. If you are seriously considering collaborating, a useful exercise is to ask each person at the table why they want to be a member and what they hope to achieve for themselves or their organization. The answers will go a long way to building trust and mutual understanding.

Resources
Everyone has resources, although being willing or able to contribute them to the collaboration is another matter. Sometimes collaborators are unable to provide what is needed, regardless of the expectation. It is important to do a "reality check" about reasonable expectations should the collaboration proceed. Time, expertise and funds are not automatically contributed when a collaboration has been formed and people have agreed to be included. Assumptions need to be articulated as part of the discussion about the viability of a potential partnership. That way everyone is clear about what resource contributions can be made.

> *The danger is not that a particular class is unfit to govern. Every class is unfit to govern...Power tends to corrupt, and absolute power corrupts absolutely."*   *- Lord Acton*

Being Open to Diverse Thinking and Ways of Working

Every group has members from diverse communities that work, communicate and compromise in unique ways. Sharing power, risks and credit amidst such diversity is easy to agree to theoretically but, in practice, can be more difficult. Working in partnership often forces us to review our own assumptions about how things should be done. An openness to the fact that new ways of working will occur and that, at times, those involved may be challenged to do things differently is very important. Creating a partnership does not mean "business as usual". It means you have committed to a different approach and structure for working with others to achieve a common purpose.   It may be that collaboration needs to start with an acknowledgement of the diverse skills, experiences and talents that each group member brings. Diversity training, critical in a place like North Etobicoke that has so many diverse community members and organizations, is an ideal way to support the group to start to value and work across difference.
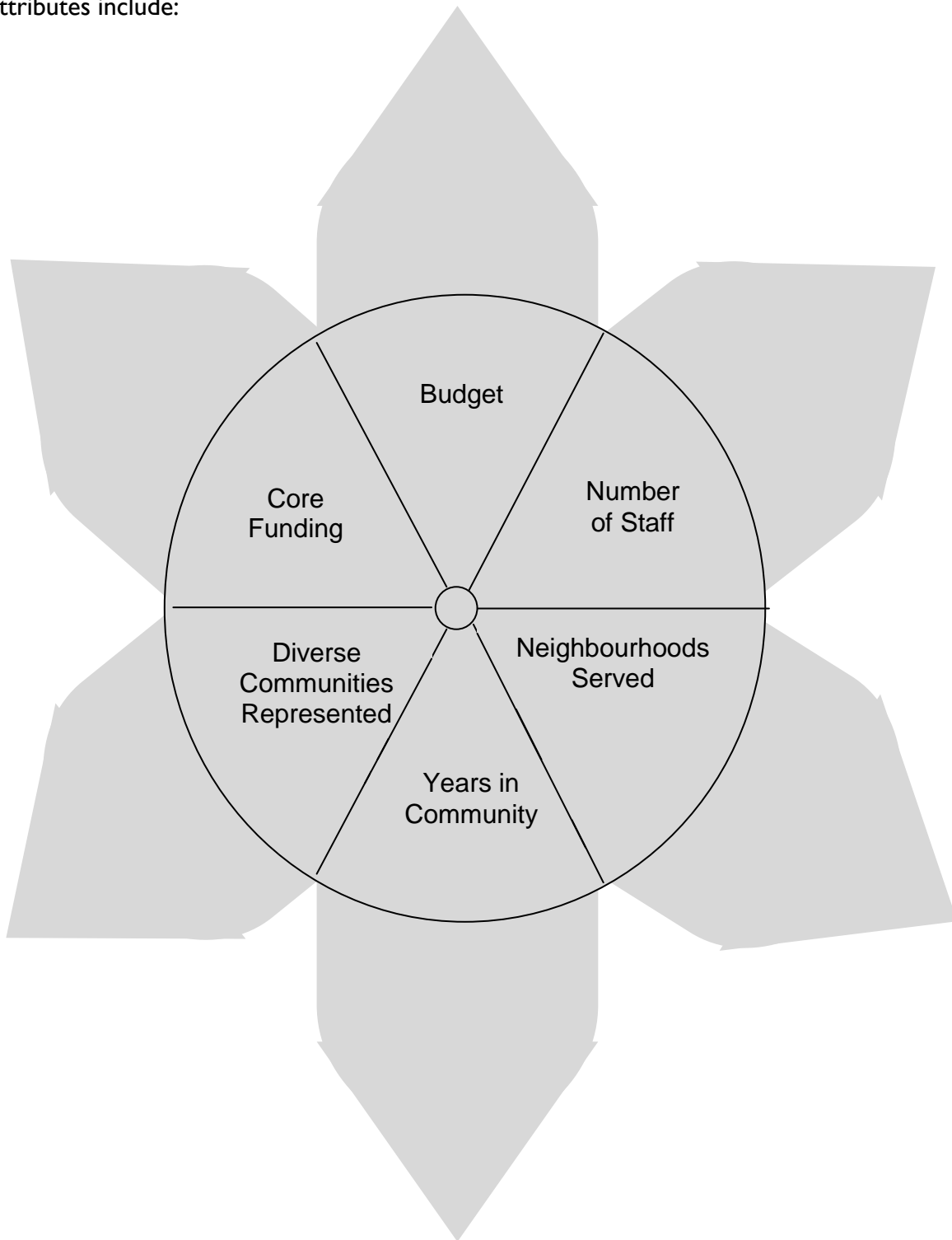
Case Study – Disclosing Self-Interest

A small group of partners were trying to improve access to settlement services for people without status. The group included representatives from health care organizations, settlement agencies and employment services. At the very first meeting, the chair of the group asked everyone to go around and talk about why they were part of the collaboration and "what was in it for them". Some of the answers were surprising.

The settlement groups wanted to make sure that they could develop better relationships with funders to eventually grow their funding base, the health care groups wanted less questions from people without status on non health-related topics and the employment groups wanted to have better access to people without status to give them supports.

The group acknowledged each other's interests and tried to plan activities in such a way as to address them: they made the settlement group the liaison with the funder so that the relationship could get developed, they developed a resource for health care workers to give to patients who had questions about status (although it wasn't part of the original plan), and they made the employment group the "face" of their marketing so that their profile would increase. The collaboration was a success for everyone, and the quality of the working relationships that were developed led to further collaboration down the road.

What Does Organizational Power Look Like?

All organizations have attributes that give them access to power. Some of these attributes include:

Budget

Number of Staff

Core Funding

Neighbourhoods Served

Diverse Communities Represented

Years in Community

EXERCISE:

- Fill out the flower above by writing down the details of your organization's attribute on the outer petal (e.g. Organization's annual budget is $500,000).

- For each petal, ask yourself **what gives organizations more access to power** (i.e. amount of money, # of staff, access to community, etc.).

- Shade in your flower petals for your organization's attributes that give you power.

- Ask the following questions:

  o How much power does our organization have in our sector? In this collaboration?

  o How can having more or less power affect our interactions with other organizations, funders, and the community? How?

  o How can having more or less power affect our perspective and our perception of other organizations? How?

RULES OF ENGAGEMENT

A vital first step in collaboration is the development of guidelines for participation. These guidelines, often referred to as "ground rules", should provide the group a framework to ensure open, respectful dialogue and maximum participation.

Generating a List of Ground Rules

There are several effective ways to create ground rules. The best way to create them is to allow the participants to generate a list. Ask them to think about what they need, as individuals, to ensure a safe environment to discuss difficult issues. If the participants are struggling to come up with ground rules, the leader of the group should suggest some that (s)he feels are important.

Ground Rule Strategies

1. It is helpful to post the ground rules somewhere visible during all meetings. The chair can then refer back to the list when they sense that participants are failing to follow one or more of the rules.

2. Challenge the participants on the ground rules early and often. If you do not set a tone of adherence to the items early in the process, it may become difficult to enforce them later.

3. If you are using more than two or three ground rules, try focusing on particular items during appropriate activities or discussions. For example, if you are facilitating a discussion in a large group, state beforehand that you would like to focus on active listening. Challenge participants to refrain from any side discussions.

4. If a particular ground rule is routinely broken, bring it back to the participants. A fruitful discussion can often arise from a close examination of why the participants are not adhering to particular items.

5. Revisit the ground rules occasionally and, if time allows, ask whether the participants would like to add any new items.

"Coming together is a beginning. Keeping together is progress.
Working together is success." – Henry Ford

Examples of Widely Used Ground Rules

Ground rules should be developed and adapted for every unique context. The following list of common ground rules should be only a starting point for your process of creating a list for your group:

1. Listen actively – respect others when they are talking.

2. Speak from your own experience instead of generalizing ("I" instead of "they," "we," and "you").

3. Do not be afraid to respectfully challenge one another by asking questions, but refrain from personal attacks – focus on ideas.

4. Participate to the fullest of your ability – community growth depends on the inclusion of every individual voice. But also be aware of taking up too much space.

5. Instead of invalidating somebody else's story with your own ideas on her or his experience, share your own story and experience.

6. Be conscious of body language and nonverbal responses – they can be as disrespectful as words.

7. Do not make assumptions about the power that other organizations have.

For ground rules to be of maximum use, meetings must be effective and efficient. For more information on running effective meetings, see page 70 in the Appendix.

THE FOUNDATION – A SHARED UNDERSTANDING OF THE PROBLEM, VISION, MISSION AND GUIDING PRINCIPLES

Creating a Shared Understanding of the Problem

After you have formed as a group, a critical step that many collaborative projects miss is first discussing the problem that they are there to solve to see if they all agree on what the problem really is.

Since many collaborative partners have met before they formally start to discuss the problems they want to address, they feel this step is done. However, it is important to revisit the discussion once the final collaborative group has been formed and all organizations have made a commitment. This allows each organization to go back to its stakeholders to check in about the problem and get their feedback and buy-in.

Example: Identifying the Problem

If gang violence among immigrant youth is the issue that brought you together, define the population to be addressed and the geographic area you are targeting.

- Why is gang violence happening?

- What is the impact of gang violence in the community?

- What are businesses saying about the issue? Other community members?

- Are there any patterns that can be proven?

- What age of youth is most affected?

- How are other youth affected?

- What incidents are most important to target (i.e. in schools, in public spaces)?

For settlement organizations, it is widely recognized that newcomers' lack of access to political, economic and social resources contributes to barriers for full engagement in Canadian life. However, some settlement organizations believe that the lack of access occurs because of poor coordination in the system. Others believe that poverty is the driving factor. Still others feel that the main problem is newcomers' lack of decision making power in civic processes. All of these reasons are significant; however it is important that these distinctions in the resolution to newcomer barriers are discussed by all parties to come to a shared understanding.

1. What are the key issues facing newcomer communities in N. Etobicoke?

2. Why do these issues exist?

3. What will resolve them?

4. What are the minimum shared understandings you need about the issue to collaborate?

5. How will all partners demonstrate that understanding to each other's satisfaction?

CREATING A VISION AND MISSION

Once the problem is agreed upon, it is time to start dreaming! The foundation of any collaboration is a shared vision. Building a vision takes time and care. It is essential for any successful collaboration.

> *"The soul cannot think without a picture."*
> *- Aristotle*

A vision is a statement about what your collaboration wants to achieve. It should resonate with all members and help them feel proud, excited, and part of something much bigger than themselves. A vision should stretch the group's capabilities and image of itself. It gives inspiration and direction to the groups' future.

Shared vision means shared responsibility, especially when everyone feels they have a part in fulfilling the vision through their organizational mandate and through the collaborative process. Collaborative activities flow from the vision and can be measured against it. The vision can also inspire others that you want to involve in your collaboration, thus becoming an engagement tool as well as a touchstone for the work.

The mission is a more precise description of what the collaboration will do. It should describe the "business" the collaborative group is in. It is a definition of how the collaboration will achieve its vision. Each member of the collaboration should be able to verbally express this mission to funders or to others in their own organizations.

Examples of Visions and Missions

VISION	MISSION
Women achieve equitable status in their communities.	The North Etobicoke Employment Collaborative will provide education, support and access to employment for women from diverse communities.
North Etobicoke is the best place in Toronto to live.	The North Etobicoke LIP will support residents to develop skills in civic participation and will support residents to organize for positive change in the community.

How does your collaboration fit with the mission of the NE LIP?

North Etobicoke LIP Mission:

- To develop a comprehensive approach to settlement and integration that fits the needs of the 6 Toronto neighbourhoods represented in Wards 1 and 2.
- To identity gaps in service and provide supports required to address these gaps, to achieve service integration.
- To be a support network for the diversity of agencies providing services for immigrants.
- To build new connections and strengthen existing connections among existing local partnerships

DEVELOPING GUIDING PRINCIPLES

Guiding principles are as important as the vision and mission. They are statements about what the group believes about the problems they have identified and about how they will work together with community members to solve them. Along with the ground rules, they also help define how people want to behave with each other as they collaborate together. They should be followed as a way to build trust between participants.

Examples of Guiding Principles

VISION	MISSION	GUIDING PRINCIPLES
Women achieve equitable status in their communities	The North Etobicoke Employment Collaborative will provide education, support and access to employment to women from diverse communities.	Women are resilient. They will make the best choices possible for themselves if given access to adequate and relevant information and support. Meaningful employment is a pathway to stronger communities. The North Etobicoke Employment Collaborative works based on a belief in equity of all members.

VISION	MISSION	GUIDING PRINCIPLES
North Etobicoke is the best place in Toronto to live	The North Etobicoke LIP will support residents to develop skills in civic participation and will support residents to organize for positive change in the community.	The best communities are ones that are led by residents. Engaging people in their communities will lead to people living in those communities for the long-term. The LIP believes in multi-sectoral efforts to engage its residents.

Check in on your vision and mission when your membership changes, when you are having challenges or conflicts in your collaboration or when you are evaluating your efforts!

"We don't accomplish anything in this world alone ... whatever happens is the result of the whole tapestry of one's life and all the weavings of individual threads from one to another that creates something."
- Sandra Day O'Connor, first woman on the U.S. Supreme Court

SPECIFYING WHAT SUCCESS WILL LOOK LIKE – DEVELOPING OUTCOMES

Once the problem has been articulated, and a vision, mission and guiding principles are named, then broad outcomes can be developed. Outcomes are your desired results and should be:

- Able to show impact on people, services, the community and/or the broader systems that are part of society (i.e. government, funding, policy systems) over the short-term and long-term.
- Measureable – you should be able to know when you have reached success in fulfilling the vision and mission.
- Framed in the positive, not in the negative.

Choosing one or two broad outcomes to measure is a good start for most collaborations. The aim should be simple outcomes which the collaboration can easily measure using indicators to see if you have been successful.

Example of Outcomes

Vision	Mission	Guiding Principles	Outcomes	Indicators that the Outcomes has been achieved
Women achieve equitable status in their communities	The North Etobicoke Employment Collaborative will provide education, support and access to employment to women from diverse communities	Women are resilient. They will make the best choices possible for themselves if given access to adequate and relevant information and support. Meaningful employment is a pathway to stronger communities.	*Short-Term*: Women know where there are job opportunities in North Etobicoke Women understand what their skills are relative to the employment market More employment organizations in North Etobicoke are working together and coordinating services	75% of women can identify 3 job opportunities in NE 80% of women can name their top 3 skills 50% of employment organizations can list all other organizations in the community

Vision	Mission	Guiding Principles	Outcomes	Indicators that the Outcomes has been achieved
		The North Etobicoke Employment Collaborative works based on a belief in equity of all members.	*Long-Term*: Women in North Etobicoke are meaningfully employed Fewer women in North Etobicoke are living below the poverty line	10% increase in rates of employment 2% decrease in women living below LICO (low income cut-offs)
North Etobicoke is the best place in Toronto to live	The North Etobicoke LIP will support residents to develop skills in civic participation and will support residents to organize for positive change in the community	The best communities are ones that are led by residents Engaging people in their communities will lead to people staying in those communities for the long-term The LIP believes in multi-sectoral efforts at engaging its residents	*Short-Term*: Increased # of residents understand what civic participation in Canada is about Increased # of residents share their ideas with service providers and each other on how to improve the community *Long-Term*: Residents report feeling safer in the community Residents organize action plans to create change in their communities	50% of residents state that they understand the municipal election process 50% of service providers in LIP state that residents are exploring community engagement 10% of residents state they feel safe in NE Resident Councils demonstrate development of special projects

Use this worksheet to develop your vision, mission, guiding principles and outcomes for your collaborative project.

Vision

It is five years from today's date and you have, marvelously enough, created the most desirable community. Now it is your job, as a team, to describe it - as if you were able to see it, realistically around you.

1. As a group, brainstorm the key words and phrases that make up your vision, or your ultimate dream for this collaboration. After you have compiled a list, put them in order of priority as a group.

2. Have a small group go away and craft a vision statement out of the prioritized words.

> *Discuss the crafted vision as a group – it doesn't have to be perfect! Try to get general agreement and then check back in on the vision as your work unfolds.*

Mission

1. Look at your vision. What is the "business" that you are in to achieve the vision? What is the special thing your collaborative group will be doing to make this dream a reality?

2. Answer this question: "In order to reach our vision, we will..."

Guiding Principles

Answer the following:

1. "When it comes to the people we are serving, we believe that they are…"

2. "We believe that people's problems are best solved by…"

Outcomes

Answer the following:

1. We will know we have been successful when:

Individuals in the community _____

Organizations in the community_____

The community _____

Funders or policy makers_____

2. Examine each statement you have made. When can the collaborative achieve these outcomes? Will it take 1 or 2 years? Then it can be considered a shorter-term outcome. Three, 4 or more years? Then it is a longer-term outcome.

3. Look at each of your outcomes. How will you measure that success – what quantifiable indicators will you use?

DEVELOPING ACTIVITIES FOR THE COLLABORATION

"If you have an apple and I have an apple and we exchange these apples, then you and I will still each have one apple. But if you have an idea and I have an idea and we exchange these ideas, then each of us will have two ideas." — George Bernard Shaw

A shared understanding of the problem, shared vision and mission for the work, guiding principles for engagement and well-developed outcomes constitute a Framework for the collaboration. That Framework guides what comes next – talking about what activities you are actually going to do.

By clearly defining activities, all stakeholders can understand what is expected of them. For example, a collaboration aimed at increasing the employment of newcomers may have an outcome of more newcomers attending job skills training sessions. An activity to achieve that outcome may be to launch an awareness campaign on public transit.

It is important to recognize that the stakeholders do not need to do everything together to be successful. Areas where working together will create the most impact should be identified, for example at public events. However, areas where service providers can work separately should also be highlighted, so that each stakeholder can go back to their organization and participate in their own way for the good of the collective. For example, a collaborative project may be interested in engaging a certain community of newcomer women in an anti-violence initiative:

- A social planning agency may ask member agencies to educate their stakeholders.
- An information and education agency may launch a campaign.
- A direct service organization may decide to run a group for women from that target group.

The three organizations may decide to come together as follows:

- Strike a Newcomer Women's Advisory Group, with client and staff representation from all three organizations.
- Prioritize hiring staff and volunteers from the identified community of interest.

Such activities can be measured when evaluating the success of the collaboration.

Vision	Mission	Guiding Principles	Outcomes	Activities
Women achieve equitable status in their communities.	The North Etobicoke Employment Collaborative will provide education, support and access to employment to women from diverse communities	Women are resilient. They will make the best choices possible for themselves if given access to adequate and relevant information and support. Meaningful employment is a pathway to stronger communities The North Etobicoke Employment Collaborative works based on a belief in equity of all members.	*Short-Term*: Increased women know where there are job opportunities in North Etobicoke Increased women understand what their skills are relative to the employment market More employment organizations in North Etobicoke are working together and coordinating services *Long-Term*: Women in North Etobicoke are meaningfully employed Fewer women in North Etobicoke are living below the poverty line	Hold job fairs with information in multiple languages Hold travelling workshops on the job market and how to navigate it that are held in apartment buildings, day cares & and women's homes Develop a database of resources across all employment organizations Approach businesses in community for job training and intern opportunities
North Etobicoke is the best place in Toronto to live	The North Etobicoke LIP will support residents to develop skills in civic participation and will support residents to organize for positive change in the community	The best communities are ones that are led by residents Engaging people in their communities will lead to people staying in those communities for the long-term The LIP believes in multi-sectoral efforts at engaging its residents	*Short-Term*: Increased # of residents understand what civic participation in Canada is about Increased # of residents share their ideas with service provides and each other on how to improve the community *Long-Term*: More residents report feeling safer in the community Residents organize action plans to create change in their communities	Integrate civic participation information in existing programs of service agencies in community Develop 6 Resident Councils that are funded by the City of Toronto in each of the 6 communities in North Etobicoke Support and train residents to develop action plans based on their stated priorities

Evaluating your success is important. For more information on evaluation of collaborations, please see page 73 in the Appendix.

WORKSHEET #5: POTENTIAL ACTIVITIES FOR YOUR COLLABORATION

1. What kinds of activities are you going to focus on in order to achieve your outcomes and your vision:

    ❑ Public education

    ❑ Small groups

    ❑ One-on-one Support

    ❑ Resources Development

    ❑ Information & Referral

    ❑ Client Advocacy

    ❑ Other activities?

2. Which organizations will do which specific activities? Are any activities jointly based?

3. Who are the people being served and what input on your activities is required from them? Are there any special geographical or demographic considerations in this project?

4. When and how will the activities begin? How long will they go on?

5. If ground work needs to be done before the collaboration implements any activities, what does it involve and when will it be done?

Sometimes It's Simple: In the 1990's, Bluntberry had one of the highest rates of HIV infection in Ontario. In order to get adequate care, however, persons with AIDS from Bluntberry had to travel to Toronto, a three-hour drive. For those without a car or those who were unable to drive, their only mode of transportation was the bus. Daily, the public bus left Bluntberry in the morning and arrived in Mississauga where they had to change for a Toronto connector. Unfortunately, this Toronto connecting bus regularly pulled out on schedule fifteen minutes before the bus arrived from Bluntberry. Once in Toronto, the patient had to walk to the hospital.

At this time, the Bluntberry Public Space Coalition, an organization committed to collaborative solutions, was working to enhance transportation in their area. When this transportation issue arose at a coalition transportation task force meeting, the coalition called for action. The private and public bus providers made an agreement to talk and see if they could find a common solution to this problem of uncoordinated schedules. And, they did. Within a few weeks, bus schedules had been modified; now, the Bluntberry bus arrived in time for riders to catch the connector to Toronto. A few weeks later, the Director of the company that managed the bus to Toronto took a ride to see what AIDS patients faced when they arrived in Toronto. He was so struck by how difficult it was to trek across Toronto by foot that he decided to have his own buses stop at the hospital directly. This simple, low-cost collaborative solution eluded those involved until a conscious process of coalition building convened the community and addressed the issue.

"Collaboration is a process through which parties who see different aspects of a problem can constructively explore their differences and search for solutions that go beyond their own limited vision of what is possible." Barbara Gray & Donna Wood[19]

CLARIFYING GOVERNANCE AND MANAGEMENT OF THE COLLABORATION

> *"When everyone has a clear role, then there is less ambiguity and confusion about the work getting done. Like any venture inside your own organization, who does what and being clear about it is essential."[20] – United Way of Greater Milwaukee*

With your vision and activities in place, next comes determining the governance and management of the initiative. This is often the place where collaborators spend most of their time in negotiation, due to a number of factors (e.g. fear of losing individual ground, power differences, resource management needs).

Governance must meet the needs of all organizations. It needs to outline who has leadership responsibility for what aspects of the collaboration. It should also outline how organizations will communicate and make decisions. Protocols may need to be developed. Pitfalls related to governance include:

- Putting too much governance responsibility (or too little) in the hands of one collaborator or one individual.
- Relying too heavily on senior leaders to make governance decisions.
- Having a "lead" agency, identified for the purpose of securing funding, that is also the default agency that makes all governance decisions.
- Making governance structures too rigid to meet changing needs of the collaboration and of individual partners.
- Not being clear on who is informed about decisions, who is included in making them, who has access to decision makers and how long decisions take.
- Not clarifying the level of involvement of the funder.

Beyond governance, the day-to-day management of the collaboration also needs to be planned. Signs of successful management include:

- Multiple forms of communication to keep all stakeholders up-to-date. This includes intra-agency, inter-agency and external communication.
- Face-to-face communication with partner organizations in the form of regular meetings, trainings and other forums.
- Ensuring that the management systems that are put into place recognize partners' other commitments (e.g. other funding requirements, financial obligations, etc.).
- Check-ins to see if management strategies or structures need to change over time.
- Well defined administrative systems (e.g., cheque signing, contract review, meeting minutes, etc.).

Decide on the Structure of the Collaboration

1. What is the best way to organize the collaboration so that the work gets done? Will you all come together for all project activities or will you form sub-groups that work on certain areas? If there are sub-groups, how will they make decisions? How will they communicate with each other?

2. Who chairs the various groups?

Clarify Organizational Roles and Decision-Making

1. How will decisions get made?

2. Is there dedicated staff or an ad hoc team to lead and manage the partnership? What are the human resource requirements of the collaboration and who will fulfill them?

3. Is there a champion for the collaboration in each organization who is willing to become involved and overcome organizational hurdles?

Remember to go back to your identified strengths, weaknesses and what you can offer when you make decisions about your role in the collaborative effort

4. Who will be accountable for collaboration performance and results? (e.g. collaboration staff, one of the partners, etc.)

5. How will the collaboration project be institutionalized in each partner organization's plans and practices to ensure continuity despite any personnel changes?

6. Does any partner have formal reporting requirements? (e.g. program conditions of a government agency, funding policy in a private sector partner)

7. In what form and how often will the collaboration report? To whom?

8. What level of formality is required to formalize the partnership (e.g. exchange of letters, memorandum of understanding, formal contract)? Who will develop this?

9. How will ongoing and effective communication about collaboration projects be maintained between the partners, within each partner's organization, and with clients and other stakeholders?

10. How often will the partners meet to appraise the collaboration's progress and the partners' performance?

11. What are some of the expected rewards for organizations as they participate in the collaboration? How will those rewards be shared?

12. Is there a need to set a date to re-confirm, renegotiate or abandon the partnership?

13. Are there "escape" clauses if the collaboration does not work well?

Securing resources

1. What is the anticipated overall cost/resource requirement of the partnership?

2. What resources are required? (e.g. financial, expertise, staff, equipment, technology)

3. What resources will each partner contribute to the project?

4. What restrictions exist on partners in committing resources?

5. Are the partners financially secure? Do they have the non-financial resources necessary for success of the project?

6. What is the workload demand on the staff of each partner?

All of the hard work you have done so far needs to be captured in agreements that are written down that all partners can agree with. This agreement is often called a Memorandum of Understanding (MOU). A group of people should be tasked with going away and drafting a MOU based on the discussions and decisions to date. It should then be brought back to the group for extensive review, discussion and approval. Please see page 76 in the Appendix for MOU templates you can use.

Read over the case scenario and answer the questions on the following page.

Case Scenario

Three North Etobicoke organizations that have had no history of working together, all independently provide parent education programs to help parents foster the social, emotional, and cognitive development of their children and better prepare them for school. All three organizations have struggled with outreach and evaluation of their programming. All three organizations compete for funding and often compete for clients.

All three organizations decide to form and run a joint program designed to make a positive impact on the development of young children called We Can Parent! All organizations feel that working together and leveraging each other's strengths will achieve greater outcomes and better evaluate their organizational impact. There was also an opportunity for some new funding that came quite quickly. As a result, the EDs of the organizations had 2 or 3 planning meetings and successfully applied for the new funding. During those meetings, they drafted the key goals, activities and outcomes for the programming. The program quickly got off the ground and was running relatively well.

After 1 year, the collaboration has now started to run into some issues. The 3 EDs meet every month to discuss the program and how it is progressing. Agency A runs the program administratively, with programming at all three sites. It was agreed that Agency A would share monthly updates on administrative issues; however, that has not happened consistently. Agency B is also not seeing as many clients as the other two, despite equal resources. As well, Agency B has changed the focus of the programming to have a more community development focus. At a recent meeting with their funder, Agency C approached the funder informally at the end of the meeting to discuss their particular organization. This has upset the other two organizations, as they had thought that there was an agreement to present a united perspective to the funder, especially when together. Lastly, the organizations struggled to get their first report to their new funder in on time and with adequate information, as the report was passed around to all three agencies (and its staff). Disappointingly, they also realized on completing the first funder report that they have not had a collective increase in clients after starting the joint program.

Questions

1. List two obstacles/challenges the group is facing now.

2. What were the mistakes made by this group of collaborators that have led to these issues?

3. How can they solve these issues now?

4. What do you think is needed for the group to work more effectively together in the future?

RESOLVING CONFLICTS

> *The bad news . . . . Conflict is inevitable no matter how we try to avoid it!*
> *The good news. . . .Conflict is an opportunity for positive change!*

WHERE DOES CONFLICT USUALLY COME FROM?

Conflict typically stems from one or more of the following six factors, which are listed below along with some tips about how to resolve them.

1. Power Struggles **Causes:** often created when expectations are not being met.	**Recommendation:** address underlying issues like loss of control or history of conflict and take time to understand expectations and deal realistically with what can and cannot be done. Remember that the right solution might be that somebody leaves, hopefully without hard feelings. Get outside help if you need it.
2. Low Trust **Causes:** can occur when leadership lacks skills, self-interests are not being disclosed or communication is poor.	**Recommendation:** get a new leader or build the skills of the existing one(s). Discuss self-interests and open up communication. Discuss trust as one of the topics.
3. Loss of Focus **Causes:** can occur when the members or leaders are not clear about the direction or vision.	**Recommendation:** go back and link what is being done to the vision, remembering the difference between people who want small steps and immediate results and those who prefer to deal in the bigger picture.
4. Lack of Leadership or Authority **Causes:** occurs when partnerships do not have clear governance and management structures. In addition, lack of continuity due to a weak individual commitment and irregular attendance can contribute to this problem.	**Recommendation:** clarify authority and reason to exist, ensure that the partnership is wanted and needed, insist on consistent representation and attendance at least until the partnership's foundation is solid.
5. Picking the Wrong People **Causes:** when people are chosen or volunteer for the wrong reasons, or are sent and don't really wish to participate.	**Recommendation:** this is risky, but must be dealt with – ask each member to review why they are involved, what they expect and what they will provide. Seek replacements for those who can't or won't live up to the group's expectations and needs.
6. In-Fighting About the Work **Causes:** occurs when people debate about the activities or work even after agreement has been reached. Sometimes happens when people cannot see success in the future.	**Recommendation:** review your outcomes. Can they be achieved? Revise if needed. Look at how things are planned to be done, and gather specific and concrete input if things need to change. Do not simply accept that it won't work -- look for suggestions about how it could be better. If needed, bring in outside expert help to facilitate.

CONFLICT RESOLUTION PROCESS

Eight Simple Steps to Conflict Resolution
The following suggested steps to conflict resolution can be useful in resolving conflict on all levels. To get there, we must continually practice.

1. Arrange a time for discussion.

2. At the beginning of the discussion, those involved clearly restate the problem and concern.
   - *This can be more difficult for some people than others, but the advantage is that all participants will start by hearing about the issue from everyone's perspective.*

3. Each person states their feelings about the concern.
   - *Use "I" messages to explain what you are feeling and your concerns.*
   - *Do not use "You" statements. People automatically assume a defensive position when they hear "you" statements!*
   - *Your goal is to settle the conflict, not create more hostility.*

4. Each person states what particular change he/she would like to occur.

5. Each person listens to the responses of others.
   - *Use active listening skills*

6. If it becomes too difficult to continue, a time-out is called.

7. If agreement is reached, be sure each side is clear on the terms.
   Possible solutions:
   - *All agree to suggested resolution, or*
   - *A compromise is made – people give up something in the dispute but arrive at a decision satisfactory to all, or*
   - *A satisfactory decision cannot come from this meeting, so parties decide to meet again using a neutral facilitator to assist in finding a solution.*

8. Decide when to meet again to monitor the agreement.

Pointers for Successful Negotiation

Regardless of the situation and the concerns, when dealing with others:

1. Negotiate from positions of equality.

2. Avoid ultimatums – they leave no room for compromise.

3. If one loses, both parties lose.

4. Say what you really mean.

5. Avoid personal attacks and accusations about an individual.

6. Own your own feelings first – go deep inside yourself to clarify what is really bothering you about this concern or problem.

7. Check out your perceptions – get sufficient data clarification.

8. State your wishes and requests clearly and directly – no vague messages.

9. Repeat the message you received/heard, using active listening

10. Refuse to "fight" dirty – using power, authority, or talking about someone's vulnerable issues (We all have a vulnerable point beneath which it is no longer legitimate to go. This varies with the individual and context).

11. Focus on the specific issue.

12. Call "time out" – which allows one to get back to the issue at hand.

13. Strive for closure and agreement as soon as possible.

Are you not having conflict in your collaboration, but things just don't feel right? Check out page 82 in the Appendix and take the quiz to see if your collaboration is "stuck".

It is not the strongest species that survive, nor the most intelligent, but the ones who are most responsive to change" – Darwin

LIABILITY AND RISK ISSUES

All too often, organizations that are considering collaboration of some kind do not spend enough time up front considering the legal and risk issues that come with working together. Critical questions include[21]:

❑ Are there collective bargaining agreements, existing personnel policies or employment agreements that need to be considered?

❑ Does the nature of the collaboration result in a fundamental change to the terms and duties of employment of any of the employees?

❑ If an employee is being shared by two organizations, which organization should be the employer and are there any employment law implications to "sharing" an existing employee with another agency?

❑ Do organizations with member agency structures have different liability and risk issues and if so, what are they?

❑ Will joint decisions being made get protected by Directors and Officers Liability Insurance?

❑ What if one agency has a surplus and another a deficit? How will financial resources and securities be managed?

❑ Will existing contractual relationships be impacted? Will any licensing or registration held by the organization be compromised?

❑ Are there legal situations that may place limits on any collaboration (e.g. contracts to provide services, formal agreements with other partners)?

❑ Do we need to seek legal advice before proceeding?

❑ Do we need to place limits on information we have that partners may want to share (e.g. access to member/client lists or use of our name or logo)?

❑ If there is a wide range of conditions to potential partnerships, do we need to prepare policies and guidelines before going ahead?

❑ What are the confidentiality requirements of each partner?

❑ Who has intellectual property ownership of any products that are produced as a result of the collaboration?

Real teams don't emerge unless individuals on them take risks involving conflict, trust, interdependence and hard work.
- Katzenbach & Smith

CONCLUSION

After implementing a collaborative project, what comes next? Some collaborations come to a natural end. The work has been completed, and the mission and vision has been achieved. Other collaborations continue on, taking on new activities or building on what has been accomplished to date. Regardless of which direction the project takes in the future, the current collaboration's accomplishments should be celebrated. One way to do this is for everyone involved in the collaboration to make note of the good work they have contributed and the results of their effort. See page 83 in the Appendix for *Making it Work: 18 Successful Factors of Collaboration*, a helpful resource that lists various factors that directly influence the success of collaborations.

Why is celebration so important? The reason is simple. Collaboration is perhaps the most critical thing you can do to build a stronger community. In order to address problems at their core, it requires our collective effort. No individual can do it alone. When we come together, the impact can be powerful. The North Etobicoke LIP has made a commitment to implement a settlement strategy to enhance the lives of immigrants and refugees in the community. Collaboration is the key tool for the LIP to realize that strategy. The more collaboration is acknowledged as a success factor, the more momentum will result from it, resulting in a continued desire to work together. That success will benefit the entire community. We invite you to witness the results for yourself.
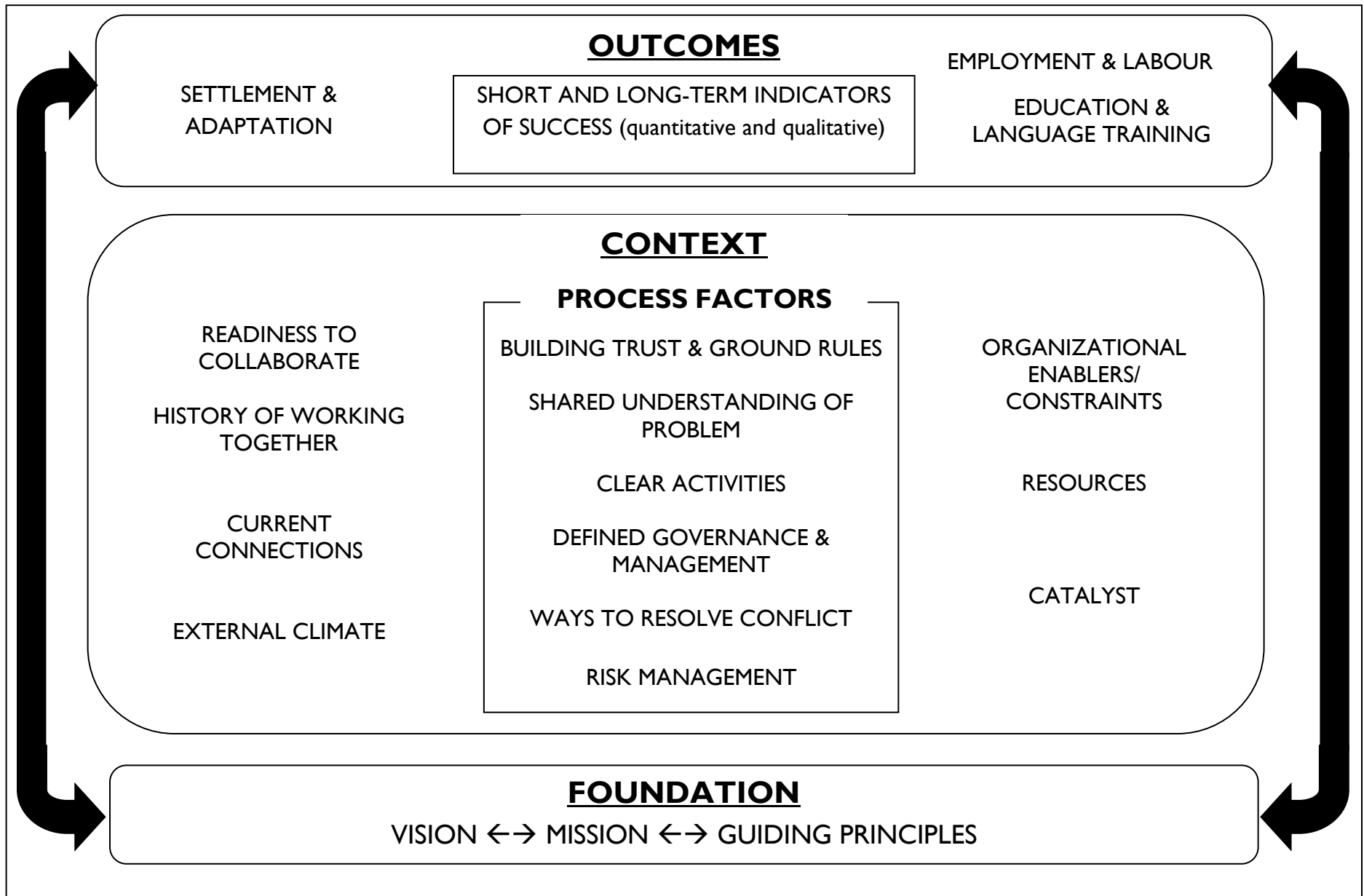
"You must be the change you wish to see"
– Mahatma Gandhi

APPENDIX

NORTH ETOBICOKE LIP COLLABORATION FRAMEWORK

OUTCOMES

SETTLEMENT & ADAPTATION

EMPLOYMENT & LABOUR

EDUCATION & LANGUAGE TRAINING

SHORT AND LONG-TERM INDICATORS OF SUCCESS (quantitative and qualitative)

CONTEXT

PROCESS FACTORS

READINESS TO COLLABORATE

HISTORY OF WORKING TOGETHER

CURRENT CONNECTIONS

EXTERNAL CLIMATE

BUILDING TRUST & GROUND RULES

SHARED UNDERSTANDING OF PROBLEM

CLEAR ACTIVITIES

DEFINED GOVERNANCE & MANAGEMENT

WAYS TO RESOLVE CONFLICT

RISK MANAGEMENT

ORGANIZATIONAL ENABLERS/ CONSTRAINTS

RESOURCES

CATALYST

FOUNDATION

VISION ←→ MISSION ←→ GUIDING PRINCIPLES

LIP COLLABORATION FRAMEWORK

THE FOUNDATION

The Foundation represents the common ground of understanding between collaborators. It is a sense of shared purpose that binds people together and inspires them to fulfill their deepest aspirations. Building a foundation takes time, care and strategy. Together, the vision, mission and principles describe why the collaboration matters and how it fits in the larger world. This core is essential for any successful collaboration.

Element	What It Is	Example
Vision	The ultimate change you wish to see as a result of the collaboration	Youth in North Etobicoke are successful contributing members of the community
Mission	How does your collaboration fit with the NE LIP's mission	Coordinate youth leadership development programs
Guiding principles	The values driving this collaborative venture The key things you believe about your work together How you will operate with each other on a day-to-day basis	Youth are resilient Youth can make good decision when supported with information and access to opportunities Working together will produce better results than working alone

THE OUTCOMES

Outcomes are the desired "conditions" for the community. They reflect success in working to reach the collaboration's vision. Outcomes result from the behavior and actions of people, groups, and organizations. A group focusing on defining the desired outcomes in the initial stage of building the collaboration is more likely to increase its effectiveness and the likelihood of engaging greater participation by a wide cross section of people and groups to create the vision.

Element	What It Is	Example
Impact on People	Changes in people, families and/or communities that will happen as a result of your collaboration	Families living on low incomes report increase in livable wage jobs
Impact on Services	Changes that will result in the quality or quantity or type of services as a result of your collaboration	Services a coordinated through a central hub
Impact on the Community and/or Broader System	Changes to community or broader systems in Toronto or Ontario that will occur as a result of your collaboration	Area businesses report a decrease in vandalism

THE CONTEXT

The context is the key factors in the environment that are related to the effectiveness of collaboration.

Element	What It Is	Example
History of Working Together	Your history of working together, including what worked well in the past, what could have gone differently and how issues were solved	Sharing referrals Sharing program information Applying for joint funding
Current Connections	Ways that you are connected to each other now (i.e. networks, other collaborations, through other organizations) What you currently do together that you can build on or learn from	Membership in community-based coalitions Shared funders Shared donor base Shared client groups
Expertise	The kinds of and levels of expertise each collaborator bring to the table (e.g. on the community, on the services being provided, on collaboration)	Community development Understanding the cultures and traditions of certain ethno-racial communities
External Climate	The current climate that is going to influence this collaboration The municipal, provincial, federal policies that collaborators need to be aware of (including funder trends or policies, and political issues) The key environmental strengths, challenges, opportunities and constraints?	Funders are very interested in funding both community development initiatives and collaborative efforts
Organizational Enablers/ Constraints	The key strength your organization can offer in this collaborative process The key factors in regard to your organization that will help make this collaboration a success Your key areas of growth in regard to this collaborative process The key factors in regard to your organization that will present potential challenges in this collaboration	Up-to-date technology to gather and analyze data Reputation in the community Research skills Strong relationships with funders
Resources	The in-kind, human and financial resources that your organizations can contribute towards this collaboration	Money Space Staff support Administrative support
Catalysts	The factors that sparked this potential collaboration How the dialogue on collaboration was started and when it began Why collaborating was seen as a potential path to take	Funder interest Community crisis Community demographic trend or need Strategic planning processes

THE PROCESS

Process Factors focus on the "how to" aspect of collaboration. They deal with the specific skills and/or components necessary to build effective working relationships and contribute to the success of a collaborative effort.

Element	What It Is
Building Trust	The trust building process that would work best with your organizational stakeholders How you will know you have started to trust your partner organization
Leadership	How leadership will be defined and determined in this collaboration The kind of skill development in collaboration would be most helpful for your leaders
Shared Understanding of problem	The different ways the issue is understood in the community and how your organization understands it The minimum shared understandings you need about the issue to collaborate
Clear Goals, Activities and a Workplan	How you will reach your stated outcomes (i.e. your goals) What you will do to realize your goals (i.e. activities) Clearly defining roles Clarifying timelines
Defined Governance and Management	The level of decision-making power your organization wants or needs when you collaborate, and what the important variables are for you How you like to make decisions and how you like to share information

When taken together, these elements create the most promising environment for successful and meaningful collaboration of any kind.

SOME TRUST BUILDING ACTIVITIES

Here are a few trust building activities you can use with your group to begin to explore and develop a strong sense of trust with each other:

Who's Got a Dollar?

Most people do not have a very good feel for their own personal level of trust. "Who's got a dollar", is a good initial exercise to get newly forming team members to start thinking about their own personal level of risk taking and trust. Here's how it works.

The leader stands up and asks the team "who's got a dollar?" Eventually, someone reaches into their pocket or purse and comes out with a dollar. The leader walks over asks for the dollar and holding the coin together with the giver, asks the giver "What are your hopes and aspirations for this collaboration? In other words, what kind of a collaboration would you like to have?" When the giver has answered the question, the leader walks over to another person and hands them the dollar asking the recipient the same question, and listening to their answer. Next, the leader asks the group, "Who's got a ten dollar bill?" More fidgeting and up pops a ten dollar bill. The same question is asked of the giver, and then of the recipient of the ten dollar bill. Now, the leader asks, "Who's got a twenty dollar bill?" Again the question is asked and transfer of money takes place. At this point the leader stops, asks for the money to be returned to its rightful owners, and explains the importance of trust to the performance of teams. The leader asks each person to silently reflect on their thoughts and feelings about taking risk and trusting that the money would be returned while the exercise was in progress. Did you volunteer your money, that is, take risk. How did you feel? A little sheepish? What about when the ante was upped to ten dollars? Twenty? Did you think the volunteers were foolish? We may not all be as trusting as we thought.

The leader should recognize that the question about hopes and aspirations for the collaboration was a ruse intended to give the team something besides making a trust decision to think about while the exercise was in play. However, recognizing that one essential element of collaboration is that they share a common vision, it is useful to point out the similarities in each giver and recipient's answer. In fact this exercise can form the basis for a team starting to develop a shared vision.

Trust Box

Clearly mark off a small playing area. The size will depend on the number of people in the group. Everyone in the group should be able to easily touch someone else when standing in the area.

Ask the participants to begin walking around the space. When someone feels ready, s/he says loudly and clearly "I'm falling". Everyone else then rushes to catch the faller as s/he begins to lean back and fall. After one person goes, everyone should then resume moving through the space until the next person feels ready to fall. Be aware that two people might say, "I'm falling" at the same time. Depending on the size of the group, this is okay. Just make sure the group is aware and that they must catch both of the falling people. Find a conclusion after either everyone has gone, or gone multiple times. After finishing, process the activity, exploring if people felt supported, what risks were taken and what was hardest and easiest about the activity.

Global Vote

Position two large signs about 30 to 50 feet apart. On the left sign (as you face it), write "Almost Never" and the number "1." On the other sign, write "Almost Always" and the number "7." Each partner should visualize a scale between 1 and 7 between the two signs. A facilitator will make a series of statements. After the first statement, the partners should stand on the scale at the number corresponding to his/her impressions or responses to the statement. After all partners are standing on the scale, the facilitator will select someone and ask, "Why are you standing there?" The facilitator should ask another person the same question and continue doing so until all partners have the opportunity to respond.

Repeat the activity for the three following statements:
- We tell each other the truth.
- We respect one another.
- We seek to understand one another.

After asking "Why are you standing there?" to each partner for the third statement, the partners need a break to think about what the other team members have said and how they might better work with each other.

LEARNING MORE ABOUT PERSONAL POWER

In Toronto, the non-profit sector is characterized by significant diversity in the workers and the communities they serve. Diversity is a broad term that refers to the wide variety of differences that exist among people. Diversity is commonly understood to include differences based on race; age; place of origin; religion; ancestry; Aboriginal status; skin colour; citizenship; sex; gender identity; sexual orientation; ethnic origin; disability/ability; marital, parental or family status; same-sex partnership status; creed; language; educational background; literacy level; geographic location; income level; cultural; and work experience, but is not limited to these. Diversity is enriching, and not a problem.

Based on these differences between people, in collaborative relationships, as is any other relationships in our community and our society, oppression can happen. Oppression occurs when a group (or groups) of individuals use one or more forms of power to suppress another group (or groups) in order to maintain or improve their own position. Oppression can be overt, for example, the use of active tactics in meetings to repress an individual or group of individuals, or covert, that is, woven through group interactions. Oppressions are so thoroughly embedded in Canadian culture and social institutions that they affect everyone and yet are often invisible. They affect the perception of people who - knowingly or unknowingly - carry oppressive attitudes and stereotypes which make them prejudge individuals and situations. These perceptions lead to behaviours that spread oppressive behaviours.

Oppression can stop when we understand group dynamics, legal responsibilities and the positive impact of diversity in collaboration. Changes in the way groups function and also in our personal attitudes are both critical. Fighting oppression means examining power relationships and seeing the parallels, intersections and distinctions between all forms of oppression and the ways in which they manifest themselves. Anti-oppression also recognizes dominant group privilege and internalized oppression and sees the overlap and distinctions between both.

WHITE PRIVILEGE: UNPACKING THE INVISIBLE KNAPSACK

An excerpt of an article by Peggy McIntosh, Associate Director of the Wellesley College Center for Research for Women. This essay is excerpted from a Working Paper entitled "White Privilege and Male Privilege: A Personal Account of Coming To See Correspondences through Work in Women's Studies" (1988). Independent School. Winter 1990. It is considered a classic, must-read by diversity and anti-oppression educators.

"I was taught to see racism only in individual acts of meanness, not in invisible systems conferring dominance on my group"

Through work to bring materials from women's studies into the rest of the curriculum, I have often noticed men's unwillingness to grant that they are over privileged, even though they may grant that women are disadvantaged. They may say they will work to women's statues, in the society, the university, or the curriculum, but they can't or won't support the idea of lessening men's. Denials that amount to taboos surround the subject of advantages that men gain from women's disadvantages. These denials protect male privilege from being fully acknowledged, lessened, or ended.

Thinking through unacknowledged male privilege as a phenomenon, I realized that, since hierarchies in our society are interlocking, there was most likely a phenomenon of white privilege that was similarly denied and protected. As a white person, I realized I had been taught about racism as something that puts others at a disadvantage, but had been taught not to see one of its corollary aspects, white privilege, which puts me at an advantage.

I think whites are carefully taught not to recognize white privilege, as males are taught not to recognize male privilege. So I have begun in an untutored way to ask what it is like to have white privilege. I have come to see white privilege as an invisible package of unearned assets that I can count on cashing in each day, but about which I was "meant" to remain oblivious. White privilege is like an invisible weightless knapsack of special provisions, maps, passports, codebooks, visas, clothes, tools, and blank checks.

Describing white privilege makes one newly accountable. As we in women's studies work to reveal male privilege and ask men to give up some of their power, so one who writes about having white privilege must ask, "having described it, what will I do to lessen or end it?"

After I realized the extent to which men work from a base of unacknowledged privilege, I understood that much of their oppressiveness was unconscious. Then I remembered the frequent charges from women of color that white women whom they encounter are oppressive. I began to understand why we are just seen as oppressive, even when we don't see ourselves that way. I began to count the ways in which I enjoy unearned skin privilege and have been conditioned into oblivion about its existence.

My schooling gave me no training in seeing myself as an oppressor, as an unfairly advantaged person, or as a participant in a damaged culture. I was taught to see myself as an individual whose moral state depended on her individual moral will. My schooling followed the pattern my colleague Elizabeth Minnich has pointed out: whites are taught to think of their lives as morally neutral, normative, and average, and also ideal, so that when we work to benefit others, this is seen as work that will allow "them" to be more like "us."

Daily effects of white privilege

I decided to try to work on myself at least by identifying some of the daily effects of white privilege in my life. I have chosen those conditions that I think in my case attach somewhat more to skin-color privilege than to class, religion, ethnic status, or geographic location, though of course all these other factors are intricately intertwined. As far as I can tell, my African-American coworkers, friends, and acquaintances with whom I come into daily or frequent contact in this particular time, place and line of work cannot count on most of these conditions.

1. I can if I wish arrange to be in the company of people of my race most of the time.
2. I can avoid spending time with people whom I was trained to mistrust and who have learned to mistrust my kind or me.
3. If I should need to move, I can be pretty sure of renting or purchasing housing in an area which I can afford and in which I would want to live.
4. I can be pretty sure that my neighbours in such a location will be neutral or pleasant to me.
5. I can go shopping alone most of the time, pretty well assured that I will not be followed or harassed.
6. I can turn on the television or open to the front page of the paper and see people of my race widely represented.
7. When I am told about our national heritage or about "civilization," I am shown that people of my color made it what it is.
8. I can be sure that my children will be given curricular materials that testify to the existence of their race.
9. I can be pretty sure of having my voice heard in a group in which I am the only member of my race.
10. I can be casual about whether or not to listen to another person's voice in a group in which s/he is the only member of his/her race.
11. I can go into a music shop and count on finding the music of my race represented, into a supermarket and find the staple foods which fit with my cultural traditions, into a hairdresser's shop and find someone who can cut my hair.
12. Whether I use checks, credit cards or cash, I can count on my skin color not to work against the appearance of financial reliability.
14. I can arrange to protect my children most of the time from people who might not like them.
15. I do not have to educate my children to be aware of systemic racism for their own daily physical protection.
16. I can be pretty sure that my children's teachers and employers will tolerate them if they fit school and workplace norms; my chief worries about them do not concern others' attitudes toward their race.
17. I can talk with my mouth full and not have people put this down to my color.
18. I can swear, or dress in second hand clothes, or not answer letters, without having people attribute these choices to the bad morals, the poverty or the illiteracy of my race.
19. I can speak in public to a powerful male group without putting my race on trial.
20. I can do well in a challenging situation without being called a credit to my race.
21. I am never asked to speak for all the people of my racial group.
22. I can remain oblivious of the language and customs of persons of color who constitute the world's majority without feeling in my culture any penalty for such oblivion.
23. I can criticize our government and talk about how much I fear its policies and behaviour without being seen as a cultural outsider.

24. I can be pretty sure that if I ask to talk to the "person in charge", I will be facing a person of my race.
25. If a traffic cop pulls me over, I can be sure I haven't been singled out because of my race.
26. I can easily buy posters, post-cards, picture books, greeting cards, dolls, toys and children's magazines featuring people of my race.
27. I can go home from most meetings of organizations I belong to feeling somewhat tied in, rather than isolated, out-of-place, outnumbered, unheard, held at a distance or feared.
28. I can be pretty sure that an argument with a colleague of another race is more likely to jeopardize her/his chances for advancement than to jeopardize mine.
29. I can be pretty sure that if I argue for the promotion of a person of another race, or a program centering on race, this is not likely to cost me heavily within my present setting, even if my colleagues disagree with me.
30. If I declare there is a racial issue at hand, or there isn't a racial issue at hand, my race will lend me more credibility for either position than a person of color will have.
31. I can choose to ignore developments in minority writing and minority activist programs, or disparage them, or learn from them, but in any case, I can find ways to be more or less protected from negative consequences of any of these choices.
32. My culture gives me little fear about ignoring the perspectives and powers of people of other races.
33. I can worry about racism without being seen as self-interested or self-seeking.
34. I can take a job with an affirmative action employer without having my co-workers on the job suspect that I got it because of my race.
35. If my day, week or year is going badly, I need not ask of each negative episode or situation whether it had racial overtones.
36. I can be pretty sure of finding people who would be willing to talk with me and advise me about my next steps, professionally.
37. I can think over many options, social, political, imaginative or professional, without asking whether a person of my race would be accepted or allowed to do what I want to do.
38. I can be late to a meeting without having the lateness reflect on my race.
39. I can choose public accommodation without fearing that people of my race cannot get in or will be mistreated in the places I have chosen.
40. I can be sure that if I need legal or medical help, my race will not work against me.
41. I can arrange my activities so that I will never have to experience feelings of rejection owing to my race.
42. If I have low credibility as a leader I can be sure that my race is not the problem.
43. I can expect figurative language and imagery in all of the arts to testify to experiences of my race.
44. I can chose blemish cover or bandages in "flesh" color and have them more or less match my skin.
45. My children are given texts and classes which implicitly support our kind of family unit and do not turn them against my choice of domestic partnership.
46. I will feel welcomed and "normal" in the usual walks of public life, institutional and social.

In unpacking this invisible knapsack of white privilege, I have listed conditions of daily experience that I once took for granted. Nor did I think of any of these perquisites as bad for the holder. I now think that we need a more finely differentiated taxonomy of privilege, for some of these varieties are only what one would want for everyone in a just society, and others give license to be ignorant, oblivious, arrogant, and destructive.

HOW TO BE AN ALLY

Allies are people who recognize the unearned privilege they receive from society's patterns of injustice and take responsibility for changing these patterns. Allies include men who work to end sexism, white people who work to end racism, heterosexual people who work to end heterosexism, able-bodied people who work to end ableism, and so on. Part of becoming an ally is also recognizing one's own experience of oppression. The list[22] below outlines some key principles in being an effective ally.

> *As seen in:*
> **The Issue of Power**
> *page 28*

1. Work to develop an understanding on your own of the personal and professional experiences of target group members rather than expecting to be taught.

2. Choose to align yourself publicly and privately with members of target groups.

3. Take risks.

4. Expect to make some mistakes and do not use that as an excuse for non-action.

5. Don't expect people to thank you for what you're doing.

6. Believe that it is in your self interest to be an ally.

7. Believe that personal growth that is necessary to be effective.

8. Be willing to learn from history.

9. Take a stand.

10. Be honest.

11. Don't over-personalize people's words or actions.

12. Understand the importance of social context for interpreting targeted group members' ideas or actions.

13. Take responsibility to share your stands with other members of dominant groups.

14. Teach children and others to celebrate and appreciate individual and cultural differences as well as human commonality.

15. Do your homework.

16. Be able to acknowledge and articulate how patterns of oppression and privilege have operated in your own life.

17. Listen.

18. Be willing to initiate change toward personal, institutional and societal justice and equality.

19. Promote a sense of inclusiveness in any organization you work in.

20. Be able to say "I was wrong" and move on - don't let yourself get mired down with guilt.

RUNNING EFFECTIVE MEETINGS

Most of us know how to participate in meetings effectively. In collaborative processes, holding effective meetings is especially important to think about, as positive meetings can set the tone for the entire collaboration.

Allow Time to Get to Know Each Other

In the beginning, and when new people join the group, it is important to stop and take some time to get to know each other, so that relationships can build. Use exercises like the *Name Game* or *Everything You Ever Wanted to Know* to get the dialogue going.

> *Name Game*
> *Go around in a circle and have everyone talk about where their name comes from. Share the story of where your name comes from and what it means, or an experience you remember related to your name. Everyone's name has a surprisingly interesting origin or story.*

> *Everything You Ever Wanted to Know about One Another*
> *1. If you were to choose a new name for yourself, what would it be?*
> *2. What's the biggest lesson you've learned in life?*
> *3. What's one of your worst habits?*
> *4. What was the best day of the past week for you - why?*
> *5. What are you wearing today which is most reflective of who you are?*
> *6. Choose a unique item from your wallet and explain why you carry it around.*
> *7. If you were given a million dollars and 24 hours to spend it in, (no depositing it in the bank or investing it) what would you buy?*

Decide On Group-Held Definitions

When groups are forming, it is important to recognize that trust, respect and responsibility are being built together as a group. It is surprising how many different ideas people have about what these words mean, and it is important for the group to come up with shared definitions that they can fall back on when working together. Consider this exercise[23]:

1. State the term (e.g. respect)
2. Brainstorm specific behaviours that demonstrate a lack of respect
3. Brainstorm specific behaviours that demonstrate high levels of respect
4. Create a short phrase from your brainstorm that you will use to jointly describe this term.

Decide on How Participation will be Managed

It is also important to set rules for how participation will be managed. Decide if you prefer for participants to raise their hands and be called on, for people to speak freely, or to maintain a speaker list. Remember that some people -- especially those who tend to be introverted -- need more time to process thoughts and speak, so less structured process may exclude them from the discussion. Still, the formal process of raising hands to be recognized may detract from the collective atmosphere needed to discuss sometimes-controversial issues.

Clarify Roles at Meetings

1. Who will call meetings and ensure that the logistics for meetings are taken care of?
2. Who will chair meetings?
3. Who will be the timekeeper and "dynamic watcher" for meetings (to ensure that conflicts are surfacing but not getting addressed, to address power issues arising during meetings)?
4. Who will take and distribute meetings?
5. Who will communicate to stakeholders about how things are going?
6. How long do these roles last? Do they rotate and if so, when?

Use a Consensus Decision-Making Framework

In terms of making decisions, most collaborations aim to use consensus decision-making frameworks. Consensus builds group cohesion by incorporating everyone's opinion in the group. Rather than approaching consensus from an "I can live with it" perspective, the approach below allows groups more room and flexibility in building collaborative agreements. The framework includes five levels, but depending on group preferences, fewer may be appropriate. The possible five levels include the following.

1. I can easily support the decision or action.
2. I can support the decision or action, but it may not be my preference.
3. I can support the decision or action with minor changes.
4. I support the will of the group, but I don't necessarily agree with the decision or action.
5. I cannot support the decision or action.

Using this framework, a group approaches decision-making on an issue or topic showing their level of support. For example, the facilitator may say, "It seems as though many of you like this idea. Let's get a reading on the level of support for the proposal. Please raise your hand and show 1,2,3,4, or 5 fingers, depending on how strongly you favour the proposal." For levels 4 and 5, the facilitator should ask direct questions to elicit participant concerns, such as "Margita, what are your specific reasons for indicating level 5?"

Manage the Time Well and Maintain Accountabilities

The following are common "rules: for meetings, but cannot be overstated in terms of building trust and a strong, cohesive group:

- Be on time for meetings.
- Make sure that meetings start on time and end on time.
- Give adequate time for meetings so people can plan to attend.
- Send out meeting minutes, agenda and materials well enough in advance.
- Ensure that everyone who has said they would do something is held accountable and asked to report back to the group on their job.

Evaluate – Learn, Learn, Learn

The best collaborations are the ones that have evaluation built in early and throughout. In essence, evaluation is a trust building and communications tool, as it allows for the gathering of data that can point to the successes and areas for growth of any given collaboration.

Evaluation involves assessing progress and accomplishments

Evaluation activities flow directly from the outcomes that are developed.

> **Example:**
>
> If a collaborative has an outcome of better understanding each other's ways of working, an indicator might be that different ways of working are actually used during collaboration. Data can be collected by asking the collaborators to keep short journals that capture key learnings.
>
> The goal is to keep it simple so as not to be overwhelming.

The results you want to achieve by the end of the evaluation process are:

- Continuous monitoring and evaluation of the collaboration to ensure effectiveness.
- A clear sense of successes and failures.
- An agreed-to process for a periodic review of the collaboration, including sharing success and acknowledging failures, so as to know what is working or not working, and to ensure that success is sustained.
- An understanding of the directions the collaboration will pursue in the future.
- A commitment to revise and/or renew your collaboration, or to bring it to a conclusion.

Determine what needs to be evaluated based on "impact" and "process". An impact evaluation will demonstrate what changes have taken place as a result of activities conducted by the collaboration. A process evaluation looks at the operations of the collaboration to determine if the approach or structure chosen by its members was effective in terms of the use of resources (human, material, financial, and time) as well as impact.

Below are examples of areas to evaluate. Under each question, describe what tools or methodologies you would use to gather the requisite information to answer each question.

Question	Information Gathering Methodology
Has the collaboration's governance, operations, and activities worked out as planned?	
What has been the level and quality of member engagement?	
Has the initiative achieved its outcomes?	
What are some of the key lessons learned, and how will they be used and disseminated?	

Question	Information Gathering Methodology
Were there any unintended outcomes – either positive or negative – for all partners of the collaboration?	
What were the tangible and intangible benefits – intended and unintended – delivered through the collaboration?	
Was there any evidence of the "added value" of the partners working together rather than individually?	
Did the collaboration increase organizational funding or enhance programming?	
Were there any challenges, constraints, or obstacles encountered and how were they addressed?	
Are there any adjustments that could be made in the collaboration's governance and operations or human, material, and financial resources that would lead to a better attainment of goals?	

DEVELOPING A MEMORANDUM OF UNDERSTANDING FOR COLLABORATIONS

At a minimum, the Memorandum of Understanding (MOU) must address:

1. **Goals and objectives of the partnership**
   - Vision statement
   - Desired outcomes

2. **Organizational structure**
   - Management plan and style
   - Chain of decision-making authority/ responsibility
   - Procedures for resolving conflict
   - Confidentiality guidelines
   - Procedures and guidelines for involving new partners

3. **Clear delineation of roles and responsibilities**
   - Substantive areas of primary responsibility and contribution

4. **Management of financial resources**
   - Information sharing
   - Supervisory responsibilities, as appropriate
   - Grant management, as appropriate
   - Evaluation

THE MOU MUST BE SIGNED BY ALL PARTNERS.

As seen in:
Clarifying Governance and Management of the Collaboration
page 50

The following pages provide templates of collaboration agreements that can be used as a basis to create your own MOU.

Visit the following links for further examples of MOUs:

http://www.insightcced.org/uploads/publications/legal/709.pdf : An example of a collaboration agreement among several nonprofit corporations to carry out a funded project in which one corporation serves as the lead agency.

http://www.insightcced.org/uploads/publications/legal/717.pdf : An example of a collaboration agreement among nonprofit corporations to engage in joint advocacy and fundraising.

http://www.insightcced.org/uploads/publications/legal/723.pdf : An example of a memorandum of understanding between two nonprofit organizations to carry out joint training and technical assistance.

http://www.sfcard.org/AEP/SampleMOU.pdf : San Francisco Community Agencies Responding to Disaster MOU

Agency
Organization Name/Title
City, State, and Zip Code

MEMORANDUM of UNDERSTANDING
BETWEEN
THE AGENCY AND SERVICE PROVIDER

SUBJECT: Format and Use of a Memorandum of Understanding

1. **Purpose**. This paragraph defines, in as few words as possible, the purpose of the memorandum of understanding and outlines the terms of the contract.

2. **Reference**. This paragraph will list the references that are directly related to the MOU.

3. **Problem**. Present a clear, concise statement of the problem, and include a brief background.

4. **Scope**. Add a succinct statement specifying the area of the MOU.

5. **Understandings, agreements, support and resource needs**. List the understandings, agreements, support and resource needs, and responsibilities of and between each of the parties or agencies involved in the MOU.

6. **Specify a certain contracting period**. (Example: The ending date of an MOU cannot exceed the end of the current fiscal year).

7. **Specify monetary and performance terms**. Explain payment rates with all rates agreed to by both parties. Designate specific time frames and dollar amounts to be paid upon completion of each identifiable task.

8. **Include a monitoring component to determine contract compliance**. If the terms of the MOU are not being fulfilled, allow for a termination clause.

9. **Effective date**. Enter the date the agreement will become effective.

_____   _____
SIGNATURE OF 1ST PARTY   SIGNATURE OF 2ND PARTY

_____   _____
DATE   DATE

Retrieved from http://www.bcnpha.ca/media/documents/PGWeb07.pdf

Partnership Agreement Template
THIS AGREEMENT DATED FOR REFERENCE {*Date*}
BETWEEN:
{*Name of organization ABC*}
{*Street address*}
{*City, Province*}
{*Postal Code*}
(Hereinafter referred to as the "ABC", e.g. Service Provider)
AND:
{*Name of organization XYZ*}
{*Street address*}
{*City, Province*}
{*Postal Code*}
(Hereinafter referred to as the "XYZ", e.g. Health Authority)

WHEREAS the ABC {*Specify services, client types, etc.*}; and

WHEREAS the XYZ; {*Specify services, client types, etc.*}; and

WHEREAS the ABC and the XYZ wish to ensure successful {*Specify services or outcomes*};

THIS AGREEMENT sets out the terms and conditions under which the ABC and the XYZ will collaborate to provide {*Service*} to {*Client type*} clients (hereinafter referred to as the "Client").

Statement of Purpose
Our purpose for this partnership is: {*e.g.: The partnership between ABC Services Society and XYZ Health Authority provides supports to persons living with mental illness.*}

Goals and Objectives {Outcomes}
The goals for this partnership are: {*Broad statements of what the partners want to achieve*}

Note: A work plan can be attached as an appendix to the agreement. The work plan would specify steps towards achieving the desired outcomes. See attached sample, Appendix A.

Roles of Partner Organizations
Describe who will do what in the partnership, who will be responsible for what, who will report to whom, and how the partnership and its activities will be managed. For example:

ABC Responsibilities
The ABC will:
1. *assign a liaison with the XYZ*
2. *enter into a Service Agreement with the Client;*
3. *provide defined services to the Client;*
4. *request the XYZ's intervention if the Client's behaviour puts their supports at risk; and*
5. *work with the XYZ to support the Client's continued support services.*

XYZ Responsibilities
The XYZ will:
1. *assign a liaison to the ABC*
2. *monitor the Client on a regular basis and ensure adequate supports are provided to the Client;*
3. *work with the ABC to resolve any issues with the Client that might put their services at risk; and*
4. *in the event of a termination of service, work with the Client to find other support.*

Note: the more detail you include, the less opportunity for misunderstandings and conflict. For example, role descriptions (task assignments) for the partnering organizations' representatives could be attached as an appendix.

Resource Commitments
This section is used to describe staff, facility, and/or in-kind commitments

Financial Commitments
This details the financial contributions of each partner. It is useful to include a budget under this section, e.g.:

Budget Item Total	Budget {$}	Amount, A-B-C	Amount, X-Y-Z
Personnel			
Management			
Supervisors			
Staff			
Volunteer expenses			
Total Personnel			
Expenses			
Partnership meetings			
Travel, etc. etc.			
Total Expenses			
PARTNERSHIP TOTAL			

Communications Plan
A communications plan would outline both internal {to each partnering organization} and external {the larger community} communications

Evaluation Criteria
Evaluation based on the objectives and indicators under Goals and Objectives

Decision Making
A mutually satisfactory decision-making process, e.g.: majority rule or consensus

Dispute Resolution
A mutually satisfactory dispute resolution process, e.g.:
Where differences arise, the partners agree to:
o *Address their differences in a timely, open and honest manner;*
o *Attempt to resolve issues at the staffing level at which they occur;*
o *Engage an independent mediator, if appropriate, to assess the partnership and/or the situation, either when required or as part of a formal evaluation.*

Termination of Partnership
A mutually agreed-upon termination process, e.g.:
The partners would acknowledge that their partnership is no longer viable and may be impeding the achievement of the goals and objectives. If such occurs and the issues cannot be satisfactorily resolved following the process identified under Dispute Resolution above, the partners agree to dissolve the relationship, honourably and without acrimony, following:
o *Management Committee discussion of the situation and alternatives to the current arrangements;*
o *Notice being served in writing to all pertinent stakeholders; and*
o *A transition period of {number of} months.*

IN WITNESS OF THIS AGREEMENT the parties have executed below:

{NAME OF ABC}
per its authorized signatories

_____   _____
Signature   Print name and title

{NAME OF XYZ}
per its authorized signatories

_____   _____
Signature   Print name and title

Appendix A – Sample Work Plan

Tasks to Do	Criteria for Excellence	Agency Primarily Responsible	Deadline or Schedule
Conduct internal planning process	Six components completed. Planning process approved and supported by a minimum of 75% of board and senior staff	ABC and XYZ	By June 30
Convene workshop of partners' board and staff members	A minimum 75% of participants rate the workshop as "very useful"	ABC	By August 1
Convene meeting of partners' board and staff members to review "Partnership Checklist"	A minimum 75% of items on checklist checked off as completed	XYZ	By September 1
etc.	etc.	etc.	etc.

ARE WE STUCK? WHAT AREAS CAN BE STRENGTHENED?

Yes / No   1. Are all partners affected by the problem addressed by the project?

Yes / No   2. Is there a strong core of committed partners?

Yes / No   3. Is the team open to reaching out to include new people?

Yes / No   4. Are there ways for meaningful involvement from all interested partners?

Yes / No   5. Have team norms been developed?

Yes / No   6. Do partners demonstrate a willingness to share resources?

Yes / No   7. Is time provided for partners to get to know each other?

Yes / No   8. Have relationships deepened as a result of the partners working together?

Yes / No   9. Are all team members clear about the purpose of the collaboration?

Yes / No   10. Do you trust team members to move beyond personal agendas?

Yes / No   11. When new people join is it easy to explain what the collaboration is about?

Yes / No   12. Do all team members agree on the purpose of the team?

Yes / No   13. Are meetings well run and organized?

Yes / No   14. Do you know what skills other team members have?

Yes / No   15. Do you know what skills/expertise the collaboration needs to achieve its goals?

Yes / No   16. If you have a task that requires expertise unavailable within the team, do you know where to access that expertise so implementation of the plan can continue?

Yes / No   17. Do people volunteer freely to work on projects?

Yes / No   18. Do team members share responsibility for completing tasks?

Yes / No   19. Is it clear how decisions are made?

Yes / No   20. Do leadership responsibilities shift with a shift in tasks?

Yes / No   21. Do all people feel free to speak at meetings?

Yes / No   22. Are decisions and information communicated to all members in a planned fashion?

Yes / No   23. Is there a regular time to give feedback to the project leadership?

Yes / No   24. Do you feel that your opinions are heard and respected?

Yes / No   25. Is it fun and satisfying working with this group?

Yes / No   26. Does the team make steady progress toward the goal?

Yes / No   27. Do people want to join and stay with the project?

Yes / No   28. Are there enough people involved in the project to do the task in a realistic timeframe?

Yes / No   29. Do you have the financial resources to do what the team wants?

Yes / No   30. Are members of the team clear on leadership responsibilities?

Yes / No   32. Is it clear what strategies you are working on?

Yes / No   33. Are team members clear about their assigned tasks?

Yes / No   34. Do team members carry through on what they say they will do?

MAKING IT WORK: 18 SUCCESS FACTORS IN COLLABORATION

Adapted from "Collaboration: What Makes It Work", 2nd ed., by Paul W. Mattessich, Marta Murray-Close, and Barbara Monsey, copyright 2001, Amherst H. Wilder Foundation.

The following are the 18 factors that influence the success of collaborations. Which of these are in place for your collaboration?

1. Factors Related to the ENVIRONMENT

A. *History of collaboration or cooperation in the community*
A history of collaboration or cooperation exists in the community and offers the potential collaborative partners an understanding of the roles and expectations required in collaboration and enables them to trust the process.

B. *Collaborative group seen as a legitimate leader in the community*
The collaborative group (and by implication its members) is perceived within the community as reliable and competent (at least related to the activities it intends to accomplish).

C. *Favorable political and social climate*
Political leaders, opinion-makers, persons who control resources, and the general public support (or at least do not oppose) the mission of the collaborative group.

2. Factors Related to MEMBERSHIP CHARACTERISTICS

A. *Mutual respect, understanding, and trust*
Members of the collaborative group share an understanding and respect for each other and their respective organizations: how they operate, their cultural norms and values, their limitations, and their expectations.

B. *Appropriate cross section of members*
To the extent that they are needed, the collaborative group includes representatives from each segment of the community who will be affected by its activities.

C. *Members see collaboration as in their self-interest*
Collaborating partners believe that they will benefit from their involvement in the collaboration and that the advantages of membership will offset costs such as loss of autonomy and turf.

D. *Ability to compromise*
Collaborating partners are able to compromise, since the many decisions within a collaborative effort cannot possible fit the preferences of every member perfectly.

3. Factors Related to PROCESS AND STRUCTURE

A. *Members share a stake in both process and outcome*
Members of a collaborative group feel "ownership" of both the way the group works and the results or products of its work.

B. *Flexibility*
The collaborative group remains open to varied ways of organizing itself and accomplishing its work.

C. *Development of clear roles and policy guidelines*
The collaborating partners clearly understand their roles, rights, and responsibilities, and they understand how to carry out those responsibilities.

D. *Adaptability*
The collaborative group has the ability to sustain itself in the midst of major changes, even if it needs to change some major goals, members, etc., in order to deal with changing conditions.

E. *Appropriate pace of development*
The structure, resources, and activities of the collaborative group change over time to meet the needs of the group without overwhelming its capacity, at each point throughout the initiative.

4. Factors Related to COMMUNICATION

A. *Open and frequent communication*
Collaborative group members interact often, update one another, discuss issues openly, and convey all necessary information to one another and to people outside the group.

5. Factors Related to PURPOSE

A. *Concrete, attainable goals and objectives*
Activities of the collaborative group are clear to all partners, and can realistically be attained.

B. *Shared vision*
Collaborating partners have the same vision, with clearly agreed-upon mission, objectives, and strategy. The shared vision may exist at the outset of collaboration, or the partners may develop a vision as they work together.

C. *Unique purpose*
The mission and approach of the collaborative group differ, at least in part, from the mission and approach of the member organizations.

6. Factors Related to RESOURCES

A. *Sufficient funds, staff, materials, and time*
The collaborative group has an adequate, consistent financial base, along with the staff and materials needed to support its operations. It allows sufficient time to achieve its goals and includes time to nurture the collaboration.

B. *Skilled leadership*
The individual who provides leadership for the collaborative group has organizing and interpersonal skills, and carries out the role with fairness. Because of these characteristics (and others), the leader is granted respect or "legitimacy" by the collaborative partners.

ADDITIONAL RESOURCES

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