



# Value of Collaboration Research Study

## Literature Review on Funder Collaboration

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## Introduction

Philanthropists—both foundations and high-net worth individuals—are working together on a wide range of issues from climate mitigation, to water policy, to youth development.

Funders typically pursue collaboration because they can bring expertise, relationships, and money together in a way that will produce results for society beyond the reach and capacity of any single donor. Much has been written to offer guidance to donors seeking whether and how to collaborate most effectively and efficiently. We have developed this literature review to compile the existing resources on funder collaboration—including a summary of common findings, the highest-value resources, and research gaps. This review includes an annotated bibliography summarizing the most useful documents and a list of illustrative collaborations to support readers eager to skim the research and practice before diving in more deeply.

This review encompasses academic research papers, practitioner blogs, and published articles and reports, as well as syntheses of field-specific research. We found and reviewed 125 pieces of literature: 65 percent were published by philanthropic advisors or intermediaries, (e.g., Bridgespan, the Center for Effective Philanthropy, FSG), 25 percent were published by foundations or practitioners (e.g., William and Flora Hewlett Foundation, Edna McConnell Clark Foundation), and 10 percent were published by academics or field researchers. Although we did include sources published from 2012 and before, most items in this review are from 2013 or later. While the overwhelming majority study US collaborations, global examples are included where possible.

## Key Takeaways

While much has been written about collaboratives, donors will find little in the way of quantitative or qualitative research to guide their deliberations about whether to join a group of likeminded funders in pursuit of a shared goal. Each collaborative is singular, and there are no control groups for comparison purposes. They come with different geographic footprints, ranging from small to global. They tackle many types of issues. And they are highly individual and idiosyncratic in execution. The existing research is largely case study-based, with the extensive variation across collaboratives making it difficult to discern patterns across the case studies in a rigorous way. Even so, the literature yields a number of insights that reflect practical experience. Here are the key takeaways.

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An open question is whether there are a common set of conditions that trigger (or should trigger) a collaborative to alter how it operates and, potentially, move to a different model, as well as clear guidance as to which collaborative model to select in the first place.

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## Types of collaborative models

Many of the materials we reviewed described collaborative models on a spectrum from loose to tight collective action, with information and knowledge exchanges at one end and formal joint ventures, new collaboratives, and re-granting entities at the other end. The key difference among models is the level of control that an individual donor cedes to the collaborative; that is, the distinction between pooling resources versus coordinating resources that remain under each collaborative member's individual control, and between collaboratives that coordinate or pool investment versus those that only exchange knowledge. An open question is whether there are a common set of conditions that trigger (or should trigger) a collaborative to alter how it operates and, potentially, move to a different model, as well as clear guidance as to which collaborative model to select in the first place.

## Benefits to collaboration

In the literature, we found several frequently cited expected benefits of collaboration:

- More **money** for an issue, recognizing that no one funder alone can create change at the level of ambition being tackled by most of these collaboratives
- Participation in something at **a greater scale and visibility** than funders could do alone (including influencing systemic change)
- **Increased effectiveness and better results** than could be obtained solo, due to shared strategic thinking, diligence, monitoring, access to expanded expertise and networks, and so forth
- **Increased efficiency** of grantmaking (for both donors and grantees) due to a lower cost of capital and shared resources
- The ability to take on **increased risk**

## Success factors

We also found several frequently cited success factors:

- **Trusted relationships** among participants
- Outstanding **leadership** within a well-designed, mutually agreed-upon governance and operating structure
- **Clear goals** with a **flexible and adaptive strategy**
- Processes in place for **improvement and measurement**

While all of the factors were important, many resources indicated that the human dimension is particularly critical.

### **Gaps in the literature**

We did not identify studies that calculated a “return on investment” for collaboratives, nor any that offered good formulas for estimating the expected value of any one collaborative. It is our opinion, however, that such findings may not be feasible given research constraints. We did, however, identify at least four important gaps that we believe could benefit from targeted research, the first three of which are addressed in our study:

1. Limited focus on learning from collaboratives that failed or significantly faltered
2. Limited exploration of the grantee experience (except in a small number of case studies)—especially the benefits and costs for grantees receiving collaborative funding as opposed to grants from individual funders
3. Limited attention to diversity, equity, and inclusion
4. More focus on the experience of institutional funders than individual donors

# Literature Review Summary

## A. Types of funder collaboratives

Funder collaboratives lie on a spectrum from loose to tight control and integration: on one end there are information or knowledge exchanges and at the other end more formal joint ventures, new collaboratives, or re-granting entities. Authors most frequently note distinctions between “aligning” resources that remain under their individual control versus “pooling” resources into an entity with coordinated decision-making.

Authors have used different terms, but there was general agreement about the spectrum, the collaboration types, and where they lie along the spectrum. Here is an example: (Susan Wolf Ditkoff, “Long Spoon Problem,” The Bridgespan Group, 2012; Willa Seldon and Judy Huang, “Lessons in Funder Collaboration: What the Packard Foundation Has Learned about Working with Other Funders”, The Bridgespan Group, 2014):

### Example spectrum for funder collaboratives

■ Lower integration      ■ Higher integration



- **Knowledge exchange:** Funders partner to exchange ideas and raise awareness. In this model, funders retain all decision rights. An example is Grantmakers for Education, which is “the largest and most diverse consortium of education philanthropists in the nation. . . [offering] important opportunities for meaningful dialogue, collaboration, and action on the most critical challenges in education.”
- **Coordinated funding (also known as “matching”):** Funders agree upon shared or complementary strategies, exchange ideas on an ongoing basis, and invest in aligned causes. For example, Big Bang Philanthropy’s funders commit to fund at least five common grantees at a minimum of \$50,000 each, annually.
- **Coinvestment in existing entity:** Funders invest together to support a specific initiative or organization. This requires a great deal of coordination as funds are almost always pooled. For example, the Great Bear Rainforest environmental project in British Columbia, led by Tides Canada, incorporates individual gifts from funders to make grants for rainforest conservation.
- **Creating a new entity or joint venture (NewCo):** Funders create and coinvest in a new entity or initiative that gives grants or operates programs. In Gavi (The Vaccine Alliance), the Bill & Melinda Gates Foundation provided seed funding to launch a vaccine nonprofit, which is now supported by a range of other funders and governments. Another example is Blue Meridian Partners, a capital aggregation vehicle jointly funded by general and limited partners who retain differential decision rights.

- **Funding the funder:** Funders invest in another funder with strong expertise in a content area. One example is Warren Buffett’s pledge to the Bill & Melinda Gates Foundation, allocating his own resources to be spent as part of the Foundation’s giving. Another example is donors who grant funds to community foundations for re-granting purposes against a strong local strategy.

Additional publications also included collaborative types, including Nancy Pole, “Collaboration among grantmaking foundations,” Montreal Research Lab on Canadian Philanthropy, 2016; Ralph Hamilton, “Moving Ideas and Money,” University of Chicago, 2002; Lori Bartczak, “Building Collaboration from the Inside Out,” Grantmakers for Effective Organizations, 2015; Cynthia Gibson and Anne Mackinnon, “Funder Collaboratives: How and Why Funders Work Together,” Grantcraft, 2009. In practice, the collaboration typology is oftentimes more fluid, with collaboratives encompassing multiple typologies or evolving over time.

### Gaps identified

A gap in the research was investigating **whether, and how, collaboratives adapt over time** and the extent to which impact is sustained past the life of the collaborative. Some resources noted a few examples of collaborations altering their form and case studies noted when adaptation had occurred. (Grantcraft; Hamilton, *Issues in Philanthropy*; Seldon and Huang, *Bridgespan*; Porter, James, Medina, and Chow, *The Foundation Review*), but this topic was not discussed extensively. One such example is ClimateWorks Foundation, which was founded as a new entity, and has adapted to become, at least in part, a knowledge exchange. **An unanswered question is whether there are a common set of conditions which indicate that a collaboration may need to modify how it operates over time.**

We identified guidance as to how to define certain aspects of funder collaboration given the circumstances. Many authors implied that the rationale for selecting different types of collaboratives was largely based on two critical factors: the degree to which donors will forego decision rights and align on strategies, and the demands and needs of the particular issue area or field. One guide identified use cases for different collaborative types.<sup>1</sup> In addition, many case studies looked at decision.

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1 Lori Bartczak, “Building Collaboration from the Inside Out,” Grantmakers for Effective Organizations, 2015.

## B. Value propositions and risks of funder collaboration

Although authors identified diverse value propositions to funder collaboration, the most frequently identified expected benefits were (1) bringing **more money and public attention** to an issue;<sup>2</sup> (2) enabling participation in something at **a greater scale** than funders could do alone/having the ability to influence systemic change;<sup>3</sup> (3) **creating efficiencies** by sharing research and other burdens across funders;<sup>4</sup> (4) bringing **strategic thinking—including “revolutionary thinking” and expertise** to bear (e.g., matching national funding to local expertise;<sup>5</sup> (5) increased **risk taking** (note: risk spread too thinly can be a risk of collaboration);<sup>6</sup> and (6) providing an **entry point for strategic philanthropy**, particularly for high-net-worth individuals who have not engaged with it before.<sup>7</sup>

A small number of studies **identified benefits to grantees**. The True North Fund and Growth Capital Aggregation Pilot evaluations extensively interviewed grantees and highlighted a range of benefits, including increased funding and funder relationships, a “stamp of approval,” and streamlining of reporting. Particularly beneficial were when grantees received large gifts with general operating support which allowed them to invest over a longer-term horizon.<sup>8</sup> Hamilton’s report highlighted innovations in grantmaking practice, including tailoring support to grantees and providing core support to grantees as a positive benefit (Hamilton, University of Chicago).

The literature also raised some **potential risks from funder collaboration**. Some reports questioned whether funders aligned around strategies could turn the field away from emergent ideas and practices (Ralph Hamilton, “Moving Ideas and Money,” University of

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- 2 Susan Parker, “Lessons from a Ten Year Funding Collaborative: A Case Study of the Partnership for Higher Education in Africa,” MacArthur Foundation, 2010; Olivia Leland, “A New Model of Collaborative Philanthropy,” *Stanford Social Innovation Review*, 2017; William Ryan and Barbara Taylor, “An Experiment in Scaling Impact: Assessing the Growth Capital Aggregation Pilot,” Edna McConnell Clark Foundation, 2012; Melinda Tuan, “A midpoint report on the True North Fund,” Edna McConnell Clark Foundation, 2014; Ralph Hamilton, “Moving Ideas and Money,” University of Chicago, 2002; “Donor Collaboration: Power in Numbers,” The Philanthropic Initiative, 2014.
  - 3 Susan Wolf Ditkoff, “Long Spoon Problem,” The Bridgespan Group, 2012; Lori Bartzczak, “Building Collaboration from the Inside Out,” Grantmakers for Effective Organizations, 2015; Jen Bokoff and Cynthia Gibson, “Funder Advocacy Collaboratives: Framing Thoughts,” Grantcraft, 2017.
  - 4 Cynthia Gibson and Anne Mackinnon, “Funder Collaboratives: How and Why Funders Work Together,” Grantcraft, 2009; William Ryan and Barbara Taylor, “An Experiment in Scaling Impact: Assessing the Growth Capital Aggregation Pilot,” Edna McConnell Clark Foundation, 2012; Melinda Tuan, “A Midpoint Report on the True North Fund,” Edna McConnell Clark Foundation, 2014.
  - 5 Lauren Marra and Bruce Boyd, “Three ways to maximize impact through collaboration,” Arabella Advisors, 2015; Susan Wolf Ditkoff, Alison Powell and Jennifer Morgan, “Giving that Gets Results,” The Bridgespan Group, 2014; Willa Seldon and Judy Huang, “Lessons from Funder Collaboration,” The Bridgespan Group, 2014; William Schambra, “One Cheer for Collaboration,” Philanthropy Roundtable, 2003.
  - 6 Jen Bokoff and Cynthia Gibson, “Funder Advocacy Collaboratives: Framing Thoughts,” Grantcraft, 2017; “Best Practices of Collaboration,” Connect US, 2016.
  - 7 Lisa Philp, “Education Collaboration Fund: Possibilities and Limitations of Pooled Funds,” *The Foundation Review*, 2011.
  - 8 William Ryan and Barbara Taylor, “An Experiment in Scaling Impact: Assessing the Growth Capital Aggregation Pilot,” Edna McConnell Clark Foundation, 2012; Melinda Tuan, “A Midpoint Report on the True North Fund,” Edna McConnell Clark Foundation, 2014.



Chicago, 2002)—essentially leading to “groupthink,” which could have negative effects for grantees and the field. To this point, Ford’s Fran Korten advises grantmakers to be mindful of the line between “suggesting” and “dictating” in their relationships with grantees (“Managing a Funder Collaborative: The Ford Foundation,” Grantcraft, 2003). Other resources questioned whether collaboratives risk being harmful to the role of local funders (when doing place-based or regional work).<sup>9</sup> And Grantcraft noted that power dynamics between funders (especially the regional/national dynamic) could exacerbate this risk. Finally, some noted that collaboratives may have negative effects for grantees, such as adding an additional layer or wall between grantees and funders (Elaine Fawcett, “Inside Look at a Funder Collaborative,” Four Winds Writing Inc., 2016) or limiting the number of funding opportunities available.

#### Gaps identified

Most articles focused on funder perspectives rather than those of grantees or community stakeholders. In addition, very few articles highlighted the different value propositions that collaboratives may have and how those value propositions affect structure and governance.

### C. Perspectives on impact

In seeking third party assessments of impact, we reviewed as many collaborative evaluations as we could find (either public or those shared with us confidentially).

Of the 13 collaboratives whose evaluations we reviewed, five were largely positive, two were mixed, three were largely negative, and three were non-evaluative. The evaluations echoed the value propositions identified in this literature review, including **more money or attention** for an issue, **participation in something at a greater scale** than funders could do alone (possibly including influencing systemic change), **efficiency** with lower cost of capital, strategic thinking/expertise, and the ability to take on **increased risk**. The one additional value proposition surfaced in the evaluations that was rarely mentioned in the literature on funder collaboration was **“field-building.”**

The evaluations shine light on impact at the levels we identified for study:

- **Field impact:** Evaluations noted the power of the collaboratives to get specific results (e.g., successfully advocate for policy changes) and, perhaps more commonly, to build fields. Collaboratives were noted for “effective convening” and making “rapid response” grants, and counterfactual statements such as “it’s hard to imagine the [relevant] practice would be where it is today” without the collaborative.
- **Funder impact:** Collaboratives were seen to have “deepened [participating] funders’ field expertise and led to participating funders making more strategic, informed and effective

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<sup>9</sup> Efrain Gutierrez, “Investing in Degrees Engaging Local Funders in Degree Attainment Collaboratives,” FSG, 2015; Efrain Gutierrez, Kyle Muther, and Hallie Preskill, “Investing in Degrees,” FSG, 2015; Ralph Hamilton, “Moving Ideas and Money,” University of Chicago, 2002.

investments”; funders “have reported that the benefits...continue to outweigh the costs.”

- **Grantee impact:** An evaluation noted that “all grantees made impressive progress towards their goals”; another noted that the collaborative’s “support and guidance were existential to the creation of some organizations, and allowed many more to flourish at a time when they could have withered.”

When evaluations highlighted challenges, they often described challenging funder relationships, strategic misalignment, problems with how the collaborative was structured or staffed, challenges with measurement, adaptation issues, and poor stakeholder engagement.

### Gaps identified

Although the evaluations quantified the impact or assessed whether the benefits outweighed the costs of a single collaborative, we believe there could be valuable insights by comparing a range of collaboratives with a unified and rigorous approach to impact. Potentially, studies which looked at a larger number of collaborations could begin to quantify the paths to impact by looking at such variables as increased funding, new grantees identified and funded, better/more aligned strategies funded, better oversight or accountability, better grantmaking to grantees (e.g., unrestricted dollars), better support for grantees beyond funding dollars, and increased grantmaking efficiency by providing capacity that funders did not have to replicate.

## D. Factors contributing to successful collaboration

Many sources provided conclusions about what made funder collaborations successful. The most frequently cited success factors were strong relationships; aligned beliefs, goals and strategies; mutually agreed-upon governance structures; and continual measurement and reevaluation (including having exits/ends in sight). In addition to the overwhelming agreement on the importance of aligned goals and values for collaboration, some authors argued that better outcomes arise from a collaboration’s ability to periodically reexamine and perhaps change those core beliefs, values, goals, and definitions of success, and the use of grantee feedback to do so.

While all of the factors seem important, many resources indicated that the “human dimension of collaboration” (Nancy Pole, “Collaboration among grantmaking foundations,” Montreal Research Lab on Canadian Philanthropy, 2016) is particularly critical—including navigating and managing power politics, tacit assumptions, and wishes and fears of participants through candid, trusting, and open communication among funders and their representatives.<sup>10</sup>

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<sup>10</sup> Phil Buchanan, “Barriers to Funder Collaboration and the Will to Overcome Them,” *Stanford Social Innovation Review*, May 3, 2017; The Center for Effective Philanthropy, 2017; Chris Kable, “Five Lessons on Successful Philanthropic Collaboration,” Center for Effective Philanthropy, 2016; Willa Seldon and Judy Huang, “Lessons from Funder Collaboration,” The Bridgespan Group, 2014; William Schambra, “One Cheer for Collaboration,” Philanthropy Roundtable, 2003; John Kania and Mark Kramer, “Collective Impact”, *Stanford Social Innovation Review*, Winter 2011; Robert Hughes, “Philanthropies Working Together: Myths and Realities.” Foundation Center, 2005; Bill Porter, James Kelly and Robert Medina, “How Funder Collaborations Flourish,” Education First, 2018.

There are also success factors that may be specific to different collaboration types. For example, examining and building upon existing community efforts and identifying “positive deviants” within the community may be particularly relevant in place-based collaborative efforts (Gayle Peterson, “ClimateWorks: Lessons in Leadership and Learning,” pfc Social Impact Advisors, 2016); allowing for flexibility to adapt to changing on-the-ground dynamics may be especially important for advocacy collaborations (Jen Bokoff and Cynthia Gibson, “Funder Advocacy Collaboratives,” Grantcraft, 2017; David Lewis, “Hearts and Minds: The Untold Story of How Philanthropy and the Civil Marriage Collaborative Helped America Embrace Marriage Equality,” Proteus Fund, 2015).

#### Gaps identified

Despite many perspectives on factors that contribute to a collaboration’s success or failure, the literature typically did not clearly define success for the collaborations studied, and therefore did not explicitly compare—quantitatively or qualitatively—successful and less successful collaborations. Additionally, very few studies took the **grantee perspective into account** or **explicitly addressed diversity, equity, and inclusion when determining success factors**. We believe that further investigation integrating the voices of grantees and centering diversity, equity, and inclusion would yield additional insights on how collaborations can best serve all stakeholders.

## E. Lessons from collaboratives that failed or faltered

The literature identifies a number of challenges collaborations face. Generally, the challenges are the mirror of the success factors noted above (e.g., the absence of strong relationships or explicit structure). In addition, there were a limited number of case studies that explicitly grappled with failure or a severe course correction (sometimes anonymously).

#### Gaps identified

We did not find any studies that drew insights or patterns from multiple examples of collaborations that faced significant challenge or failure. As we have noted, it would be valuable to have an analysis of challenges that reviews a large enough sample of successful and less successful collaborations to identify the most frequent types of challenges and potential tips for mitigating each.

## F. Linking the identified research gaps to potential research questions

1. What impact are funder collaboratives generating (or not), and how do funder collaboratives approach setting goals around impact?
  - A. How do we think about impact from three perspectives:
    - i. Impact on the field (i.e., results in the field as compared to a collaborative's goals)?
    - ii. Impact on collaborative members (both the collaborative's process and on individual collaborative members)?
    - iii. Impact on grantees (e.g., benefits and costs)?
  - B. We have a hypothesis that focusing on particular elements of collaborative life cycles (start-up, reaction to exogenous or endogenous shifts, and planned exit/death) may provide lessons
2. How and to what extent do collaboratives incorporate diverse perspectives and what is the potential for impact when doing so or potential for harm when failing to do so thoughtfully?
3. What can we learn from stories of collaboratives that have faltered or failed?

### Quantitative Summary of Key Research Gaps

After reviewing 125 resources, the key research gaps can be quantified as follows:

- No resources explicitly compared funder collaborations across a defined set of criteria to identify "ROI" or enable leaders to predict potential impact
- Fewer than five resources incorporated the perspective of high-net-worth individuals
- Thirteen resources incorporated the perspective of grantee(s)
- Sixteen resources detailed challenges and strategic adaptation

# Annotated Bibliography: Priority Resources

## Summarized in Chronological Order

We summarize below the most interesting resources in our literature review—taking into account the breadth or depth of insights, strength of research methodology, and several other factors.



**Hamilton, Ralph. “Moving Ideas and Money: Issues and Opportunities in Funder Funding Collaboration.” University of Chicago, February 27, 2002.** [www.fundersnetwork.org/files/learn/Moving\\_Ideas\\_and\\_Money\\_Paper\\_2002.pdf](http://www.fundersnetwork.org/files/learn/Moving_Ideas_and_Money_Paper_2002.pdf).

Ralph Hamilton, a senior research associate and co-director of the Chapin Hall Center for Children at the University of Chicago, prepared this paper to inform The Funders’ Network for Smart Growth and Livable Cities about issues in and approaches to funding collaboration. Hamilton’s central argument is that the benefits of collaboration should justify the time and opportunity cost partners invest.

Drawing from over 30 interviews, Hamilton identifies a typology of collaborations, including information exchange, co-learning, strategic alignment, pooled funding, joint ventures, and hybrid networks. For each, he shares examples.

Hamilton cites collaboration leaders as pivotal for success, as they must ensure there is:

1. Clarity of values, goals, and methods: as one funder shared, “operating something as a collaborative is a hell of a lot harder when you have to do everything by consensus; and if you don’t fundamentally agree on how the thing is to be run, it’s a nightmare”
2. Relationships, trust, and accountability: one funder shared, “relationships, that’s where the *real* accountability comes from”
3. Equal voices and standing of participants: to facilitate genuine exchange and mutuality
4. Candor about self-interest and authority: problems can arise when participants can’t deliver what they’ve promised
5. Identification of the most effective change agents within organizations: to accelerate or improve impact

When these conditions are met, Hamilton identifies the benefits of funder collaborations as:

1. Increased effect on the field
2. Increased funder learning, including common information and data, analysis and strategic discussion (particularly for thinly-staffed foundations), training on the role of being a philanthropy staff person by working with peers, and finding new grantees
3. Building knowledge: for example, providing a venue for development of new tools and ideas
4. Positioning issues through collaboration, funders can raise the profile of an issue
5. Fostering new linkages and capacities: for example, linking policy and practice as the

National Funders' Collaborative on Violence Prevention did with its local site networks testing key policy issues

6. Changing resource flows: increasing dollars, coordinating grantmaking and/or leveraging funding from another sector (for example, a Soros Foundation challenge grant that created an innovative Chicago funder collaborative)
7. Changed grantmaking practice: lowering cost for grantees by streamlining asks, funding an underserved sector, tailoring the approach to the grantee and/or providing core support

However, the author urges funders to more fully consider limitations collaborations may have, such as skewing the field, overpowering local funders, and having a high time value and opportunity cost for funders involved, before proceeding with a collaboration strategy.



**Schambra, William A. "One Cheer for Collaboration." *Philanthropy*, April 1, 2003. <https://www.hudson.org/research/2805-one-cheer-for-collaboration>.**

William Schambra is the director of the Hudson Institute's Bradley Center for Philanthropy and Civic Renewal. According to Schambra, collaboration seems reasonable and benign at first glance, but upon closer review, it could suppress or constrain new models of giving. Caution is required when collaborating to ensure philanthropic establishments are not only looking to assert authority in the philanthropic world. The author cites three factors contributing to a collaboration's success:

1. Ensuring replication and scale of models occurs only once there is evidence of impact; carefully designed impact studies can take multiple years, and there is oftentimes pressure for national foundations to take programs to scale as quickly as possible.
2. Managing collaboration overhead as it scales, especially to reduce financial burden on local funders; collaborations frequently involve nationally known expert consultants, evaluation designers, and other overhead costs that can crowd a local foundation's philanthropic budget, leaving less room for community-based efforts.
3. Ensuring structure allows for not only consensus, but also for revolutionary and visionary ideas; too often, consensus processes involving foundations with high brand sensitivity can overlook exciting and innovative solutions to a problem.

Schambra suggests local funders closely review the aforementioned factors before joining a nationally-driven philanthropic collaboration.



**Buhl, Alice C. “Local Donor Collaboration: Lessons from Baltimore and Beyond.”**  
**The Association of Baltimore Area Grantmakers, 2004.** <http://wings.issuelab.org/resources/10122/10122.pdf>.

Alice C. Buhl is a consultant with expertise on funder collaborations. She previously authored influential works on the role of regional associations as catalysts for cooperation. Buhl outlines a framework for categorizing funder collaboration structures spanning learning networks to independent vehicles for pooled funding. Conducting interviews and focus on groups on behalf of the Association of Baltimore Area Grantmakers (ABAG), Buhl profiles four funder collaborations in which ABAG participated. Through the profiles, she explores how funder collaborations begin, what makes them effective and sustainable, and what role regional associations can play in advancing collaboration.

Buhl identifies three common factors explaining how funder collaborations get started:

1. A supportive climate with strong interpersonal networks and a congenial environment for coming together
2. A credible champion willing to take on the issue and devote the necessary time, energy, and resources to bring the idea to fruition
3. The right timing for addressing a critical issue, which often coincides with a special opportunity (e.g., outside funding, a change in circumstances that results in a crisis or an environment “ripe” for change, etc.)

Buhl finds that effective and sustainable funder collaborations generally share these five key attributes:

1. They align on mission, results, resource expectations (e.g. staff time and fund contributions), and working styles/processes.
2. They take into account community context.
3. They consider the burden on grantees.
4. They provide flexibility and inclusiveness for different kinds of funders.
5. They learn and adapt to changing circumstances.

Interviewees cited many benefits to collaboration for themselves and their institutions, including:

1. The ability to do more as a group than the institution could alone
2. The ability to maximize grantmaking efficiencies
3. The ability to level the playing field between small and large funders
4. The ability to learn from other funders and their networks
5. The freedom to make grantmaking decisions that the institution might not be able to make alone

In addition, Buhl notes that city-based or regional associations can often leverage their personal relationships with local funders to sponsor or encourage funder collaborations.



**Gibson, Cynthia and Anne Mackinnon. “Funder Collaboratives: Why and How Funders Work Together,” Grantcraft, 2009.** [http://www.grantcraft.org/assets/content/resources/funder\\_collaboratives\\_secure.pdf](http://www.grantcraft.org/assets/content/resources/funder_collaboratives_secure.pdf).

Cynthia Gibson is a philanthropy leader, consultant, and expert. Grantcraft is a joint project of the Foundation Center and the European Foundation Centre and, including this document, has published a trove of practical guides on funder collaboration. This overview document aims to support what Gibson sees as rising interest in funder collaboration that has not yet been translated to practice and provides thoughts on features and types of collaborations as well as benefits and challenges. It includes examples from a host of collaborations and reflections from collaboration participants, as well as a set of questions to ask at a collaboration’s outset.

Gibson identifies the following features of most funder collaborations: shared information, opportunities to leverage/maximize resources, mutually developed structure and guidelines for operation, and attention to systemic solutions. Many but not all carry out joint funding. Gibson notes that many funders believe re-granting is *not* a collaboration.

Gibson has a simple typology for collaborations:

1. **Learning networks:** a group of funders who come together to hear what’s happening, share information, and explore potential strategies for increased effectiveness
2. **Strategic alignment networks:** funders who share a mission, strategize together, and work in concert but still do their grantmaking independently
3. **Pooled funds:** a joint “pot” of money disbursed together, where the money is not linked to any one funder. Gibson notes that pooled funds often must do the same things foundations do (e.g., analyze issues or fields, issue RFPs, select grantees, etc.)

Rather unusually for the literature, she denotes how and why some funders adapt their type of collaboration over time and illustrates a few examples.

Gibson identifies the following benefits and challenges to collaborations:

- **Benefits:**
  - Scale and efficiency—providing due diligence, the national/local angle, and more resources
  - Learning—information sharing across funders and meeting new funders
  - Strength in numbers—providing “political cover” and building influence
  - Nonfinancial resources—technical assistance, networks, etc.
- **Challenges:**
  - Control—funders may need to compromise on grantees
  - Credit—funders “need to drop their egos a bit”
  - Time and energy—collaboration can be process heavy
  - Institutional shifts—funders are “very voguey” and when staff of leadership change, commitment can wane



Gibson also advises how to organize for success, recognizing that “collaborations aren’t mindless, faceless structures.” Gibson provides some key advice: Stipulate goals and purpose early on—including clarity about what you and your institution want from the collaboration; demonstrate trust and respect for partners; establish ground rules for handling business and resolving problems early on; and consider the benefits of using an intermediary or staff to oversee the collaboration.

Gibson also offers questions as thought starters and helps troubleshoot specific issues.

Rather uniquely, Gibson offers thoughts on how to involve non-funders and shared some examples for how this worked well, whether for establishing and expanding a vision (when the Catalyst Fund started, they engaged grantees to learn what was needed), planning for follow through (when a community collaboration involves residents in planning), staking out a field (an anonymous funder built a pooled fund—the Disability Rights Fund—to be disbursed by members of the disability community), or changing the dialogue (when funders built the Sustainable Forestry Group and included nonprofits and ultimately brought Home Depot to the table).



**Parker, Susan. “Lessons from a Ten-Year Funding Collaborative: A Case Study of the Partnership for Higher Education in Africa.” MacArthur Foundation, October 2010. [www.macfound.org/media/article\\_pdfs/PHEA\\_CASE\\_STUDY\\_1.PDF](http://www.macfound.org/media/article_pdfs/PHEA_CASE_STUDY_1.PDF).**

Susan Parker is a communicator and evaluator for foundations and nonprofits. As an intermediary in the social sector, she has worked on projects with The Colorado Trust, the William and Flora Hewlett Foundation, and the Ford Foundation, among others. Parker shares that there are five factors contributing to the success of collaborations:

1. Securing senior leadership support and engaging them throughout the collaboration, with the caveat that collaborations must also ensure senior leadership delegates authority to program officers that embrace and champion initiatives
2. Carrying out brief planning periods to set clear goals and keep members focused on what success looks like
3. Establishing clear decision-making processes (e.g., whether joint activities will be funded, amount of funding per initiative, and which decisions do or do not require consensus)
4. Jumpstarting collaboration on early common initiatives to help participating funders bring strengths and capabilities to a tangible collaborative project
5. Considering an exit plan that includes strategies for long-term sustainability and ways to embed outputs and outcomes of the collaboration into pre-existing or newly established institutions or organizations

In her study of the Partnership for Higher Education in Africa, Parker found three key value drivers of collaboration:

1. Increasing the amount of capital committed to investments by collaboration members. Parker mentions that participants in the collaboration originally had pledged \$140 million less than the actual deployed capital

2. Spurring investments by other funders; in this case, philanthropic collaboration was helpful to secure funding from the World Bank
3. Collaborating on issues and ideas of scale that one organization could not do alone

Her case study on the Partnership for Higher Education in Africa is one of few publications with quantified examples of the benefits resulting from collaboration, specifically around the catalytic nature of collaborative philanthropy to attract larger funders or government funding and the increases in capital dedicated to an issue compared to individual grant-making. Although most of the success factors she cites align with the available literature, unlike most others she suggests that organizations should find a common project on which to collaborate early in the collaboration to increase buy-in and develop trust.



**Kania, John and Mark Kramer. “Collective Impact.” *Stanford Social Innovation Review*, Winter 2011. [https://ssir.org/articles/entry/collective\\_impact](https://ssir.org/articles/entry/collective_impact).**

John Kania is a managing director and Mark Kramer is a co-founder and managing director of FSG. Kania and Kramer argue that “collective impact,” the commitment of a group of important actors from different sectors to a common agenda for solving a specific social problem, is distinct from collaboration. They argue that such initiatives involve a centralized infrastructure, a dedicated staff, and a structured process that leads to a common agenda, shared measurement, continuous communication, and mutually reinforcing activities among participants. They believe that most funders try to tackle complicated, adaptive problems with “isolated impact” mechanisms, which cannot “cure” major social problems.

Kania and Kramer argue that there are five conditions of collective impact success, including:

1. **Common agenda:** For example, the Elizabeth River Project had to find common ground among corporate, government, community groups, and citizen stakeholders to develop workable initiatives; the authors note that funders can align behind such common goals, rather than fund individual organizations.
2. **Shared measurement systems:** Collecting data and measuring on a short list of indicators ensures alignment and accountability; for example, the authors note that all the preschool programs in Cincinnati’s Strive Together initiative aligned around common measures.
3. **Mutually reinforcing activities:** The power of collective action relies on the coordination of different activities where each actor fits into an overarching plan.
4. **Continuous communication:** The authors note the importance of building trust, as well as the need for frequent meetings with the right participants (“skipping meetings or sending lower-level delegates was not allowed” among the initiatives they studied).
5. **Backbone support organizations:** The authors state that expecting these initiatives to succeed without a supporting infrastructure (e.g., a separate organization and staff) is one of the most frequent reasons they fail.

The authors propose that such collective action requires funders seeing their role in a different way, from “funding organizations to leading a long-term process of social change.”



**Ditkoff, Susan Wolf. “The Long Spoon Problem—Five Models of Philanthropic Collaboration.” The Bridgespan Group, 2012.** <https://www.bridgespan.org/insights/library/philanthropy/five-models-of-philanthropic-collaboration>.

Susan Wolf Ditkoff co-leads Bridgespan’s philanthropy practice and has published widely on philanthropy topics. In this article, she summarizes the challenges that prevent collaboration: they are time consuming and expensive to do well and many donors are worried about the *quid pro quo* requests that may ensue. She also notes the benefits donors hope collaborations will deliver: more money, opportunity for coordinated action, access to networks and specialized skills, cost efficiencies, and greater visibility for causes.

The article centers on five types of collaborations, the primary dimension is how much control donors are willing to cede and a secondary dimension is how much of their own resources (time and money) do they seek to spend. The types are:

1. **The Alliance:** Funders exchange ideas and knowledge but retain decision-making control (e.g., Massachusetts Education Innovators, which convenes leaders for networking and learning).
2. **The Match:** Funders create a pool of funding which incentivizes others to give (e.g., the Social Innovation Fund, run by the government, required intermediaries to match government dollars).
3. **The Co-Investment:** Funders give in a “sidecar” way to issues or nonprofits (e.g., EMCF’s Growth Capital Aggregation Pilot).
4. **The NewCo:** Funders create a shared entity (e.g., California Forward, a jointly-funded organization to enhance California’s governance).
5. **The Re-funder:** Funders invest in another funder with knowledge (e.g., the SkillWorks investment partnership led by the Boston Foundation, which enables re-granting to workforce development causes).



**“The Promise and Pitfalls of Local and National Funder Collaborations: Lessons Learned from the Social Innovation Fund.” Grantmakers for Effective Organizations, 2013.** [https://www.inphilanthropy.org/sites/default/files/resources/geo\\_2013\\_funder\\_collaboration.pdf](https://www.inphilanthropy.org/sites/default/files/resources/geo_2013_funder_collaboration.pdf)

In this, the fifth installment in Grantmakers for Effective Organizations’ “Scaling What Works” initiative, GEO highlights lessons learned on the benefits and challenges of national-local funder collaborations and factors to foster successful collaborations based on the collaboration between the Mile High United Way in Denver and the Annie E. Casey Foundation, born from a Social Innovation Fund project.

GEO argues that national funders benefit from local funders’ on-the-ground expertise, momentum (i.e., building on what is already happening), and credibility. National funders

are cautioned not to parachute in, impose ideas unilaterally, neglect the relationship, or hide plans. Likewise, local funders benefit from national funders' money, new insight and knowledge, and stature. Local funders are cautioned not to be gatekeepers, assume that outside perspectives are bad, hold back knowledge or issues, or team up with the wrong partner.

GEO encourages local and national funders to pilot the relationship, align on goals and expectations, and acknowledge future changes including when and how partners leave. Local funders specifically are encouraged to know and share their knowledge and be a voice for their grantees and communities. National funders specifically are encouraged to learn first and act second, co-design the partnership, support the partnership (with staff time and resources), and connect partners to other funders.



**Tierney, Thomas J., Willa Seldon, and Gihani Fernando. "High Stakes Donor Collaborations." *Stanford Social Innovation Review*, Spring 2013.**

[www.ssir.org/articles/entry/high\\_stakes\\_donor\\_collaborations](http://www.ssir.org/articles/entry/high_stakes_donor_collaborations).

Tom Tierney, Willa Seldon, and Gihani Fernando are senior leaders at Bridgespan and argue that funding collaborations can increase funders' impact when strategically desirable and appropriately executed. The authors concede, "collaboration done poorly can do more harm than good." The scope of the article is confined to high stakes collaborations, defined as collaborations with a shared multi-year vision around which donors pool talent, resources, and decision-making.

The authors share six factors contributing to a collaboration's success:

1. Productive personal relationships, including leadership buy-in
2. The presence of principals at the table to enable decision-making
3. Clear structures and decision-making processes—the authors note that there is no right answer in terms of voting rights, grantmaking cycle times, and other elements, but that clarity is key
4. Flexibility to enable more ambitious goals
5. Not "playing it safe"—there is a risk of moving "toward a meaningless center" for agreement's sake
6. A planned exit strategy or timelines to revisit participation and increase accountability to minimize disruption

The authors cite the following benefits of collaborating:

- **Accessing outside expertise** (e.g., three foundations with limited knowledge in energy hiring expert Hal Harvey to found the jointly-funded Energy Foundation instead of individually "staffing up" to hire their own expertise)
- **Pursuing system-level changes** (five California foundations that seek systemic changes in state governance came together to create California Forward, a bipartisan group, to jointly push for change)
- **Aggregating growth capital** (Living Cities has invested over \$1 billion from 22 participating funders to promote urban revitalization)



**James, Rick. “Funder Collaboration: a compelling and cautionary tale.” International NGO Training and Research Centre, September 19, 2013. <http://www.grantcraft.org/curated-content/funder-collaboration-a-compelling-and-cautionary-tale>.**

Rick James is a principal consultant for the International NGO Training and Research Centre and has more than 25 years of experience working with NGOs around the globe. In this article, James highlights lessons learned from an anonymous failed collaboration where four philanthropists pooled funding for a joint project in a disguised African country.

James identifies five takeaways:

1. Do not pool funding unless participants are open to compromise and are willing to endure the start-up costs
2. Collaborate with “suitable friends” who have strong cultural fits, including their values, approaches, and ways of working
3. Travel together to the field to build trusting relationships
4. Let go of control to genuinely share ownership, both within the collaboration and with other stakeholders. Specifically, be sure to include local stakeholders into key decision-making processes in order to capture local insights as well as ensure local ownership
5. Design an appropriate governance structure that has clear expectations for decision-making processes

While the funders ultimately concluded that the results did not justify the investments, all collaboration members have continued collaborating and integrating the above lessons learned into future endeavors. This case study adds to the field for its rigorous and candid evaluation of failure.



**Huang, Judy and Willa Seldon. “Lessons in Funder Collaboration: What the Packard Foundation Has Learned about Working with Other Funders.” The David and Lucile Packard Foundation and The Bridgespan Group, July 2014. <https://www.bridgespan.org/insights/library/philanthropy/lessons-in-funder-collaboration>.**

Willa Seldon and Judy Huang are leaders at Bridgespan and argue that effective philanthropic collaboration requires not only time, money, and energy, but also thoughtful planning and communication. The authors created this report in partnership with leaders at the Packard Foundation and investigated 45 funding collaborations in which Packard participated to develop insights, along with leveraging past Bridgespan publications.

The five types of collaborations highlighted in this publication are knowledge exchanges, coordinated funding, co-investing in existing entity, creating a new entity, and funding the funder (as noted previously, on pages 5-6).

The authors identified some strategic considerations, including aligning on a vision and goals; being clear about the fit—or exception—to Packard’s strategy; designing the collaboration (decision-making, governance) to fit the partners; creating adaptable and flexible strategies; and designing for exit up front.

The authors also cite six “rules of the road” for foundations considering entering into any of these types of collaborations:

1. Before investing, weigh the costs and benefits, including the opportunity cost, and align on clear goals
2. Use a taxonomy to apply rigor to decision-making regarding the collaboration’s structure
3. Be clear about the roles the various funding partners will play and the investment required
4. Set the exit strategy up front and establish milestones along the way
5. Put in place evaluation mechanisms and grantee feedback loops, and adapt based on lessons
6. Engage the board in key collaboration discussions when central to the foundation’s work

The authors found that when these factors are in place and the collaboration is well-executed, philanthropic collaboration presents donors with the opportunity to learn from others and magnifies the sum of each partner’s contributions, producing results beyond the reach of any single donor.



**Bartczak, Lori. “Building Collaboration from the Inside Out.” Grantmakers for Effective Organizations, October 2015. <https://www.issuelab.org/resources/22852/22852.pdf>.**

Lori Bartczak is the senior director of Knowledge and Content at Community Wealth Partners and the former vice president of Programs at Grantmakers for Effective Organizations, where she has led communications and programs for more than 15 years. Her publication comprehensively illustrates how funders can think about collaboration and the steps to take in order to do so effectively. Bartczak cites 2014 GEO research that “80% of [foundation] respondents said they believe it is important to coordinate resources and actions with other funders.”

Bartczak first outlines the conditions under which collaborations make sense, urging organizations to ensure that the collaboration links to internal goals, fits into the landscape of existing actors, and has a strong groundwork of trusting relationships before proceeding. Once organizations decide to come together to collaborate, Bartczak elaborates on five types of collaborations and their respective use cases:

1. **Movements:** Collective action within a common frame that can be used to address complex, systemic challenges where funders are willing to take a supportive role
2. **Strategic alliances:** Partnership among organizations working for a common goal that maintain organizational independence; ideal for funders and nonprofits with complementary missions and established relationships
3. **Strategic co-funding:** Grantmakers align resources toward a common goal which enables greater impact due to increased cross-learning and funding flow
4. **Public-private partnerships:** Partnership between government, philanthropic, and private-sector organizations to deliver a specific service which is used by public sector agencies

5. **Collective impact initiatives:** Long-term commitments by actors from across sectors to a common agenda; best used when the issue is multi-sectoral and requires systems change

Bartczak cites these important factors contributing to a collaboration's success:

1. Focus on mission not on organization, which implies putting the mission above individual credit or intentions
2. Exercise trust not control, where funders with different capital amounts are able to collaborate effectively and equally regardless of the power dynamics
3. Lead with humility, not brand
4. Use a formal mechanism to keep the collaborative work on track (e.g., embedding willingness/dedication to the collaboration into performance reviews)

Bartczak's publication recognizes that before engaging in collaboration, "an organization needs effective internal culture, practices, and priorities that can open and orient its board, staff, and volunteers toward being better collaborators." Bartczak's work delineates strategies and implementation tactics funders can use to collaborate more effectively, bringing a pragmatic lens to the literature. Her article also shares examples of how certain grantmakers collaborate, including the Gordon and Betty Moore Foundation, among others.



**Peterson, Gayle. "ClimateWorks: Lessons in Learning and Leadership." pfc Social Impact Advisors, February 2016. [https://hewlett.org/wp-content/uploads/2017/11/ClimateWorks\\_Foundation\\_Case\\_Study.pdf](https://hewlett.org/wp-content/uploads/2017/11/ClimateWorks_Foundation_Case_Study.pdf).**

pfc Social Impact Advisors prepared this case study for the William and Flora Hewlett Foundation and the David and Lucile Packard Foundation, drawing from 65 anonymized interviews with collaboration and foundation staff, experts, peer funders, and grantees. The featured collaboration, ClimateWorks Foundation, is a joint venture led by these two foundations to tackle one of the most complex and "wicked" social problems—climate change. The report deeply analyzes the lessons learned and adaptations made from ClimateWorks 1.0, the original iteration, to ClimateWorks 2.0, including:

- **Supporting, rather than trying to "own," the field:** ClimateWorks 1.0 attempted to unilaterally manage the philanthropic community's response to climate change, whereas ClimateWorks 2.0 reimagines its role as a convener and advisor.
- **Building in regular assessment and reflection:** Rather than simply having an annual report that may or may not be read, ClimateWorks 2.0 will have an evaluation team that works closely with staff for continual organizational learning.
- **Including diverse perspectives:** ClimateWorks 2.0 has a staff with more varied background and partners with climate change advocates and other outside actors to avoid "groupthink" and strengthen strategic thinking.

This report adds to the field by setting an example of deep strategic adaptation; Charlotte Pera, the CEO of ClimateWorks, concludes: "We'll continue to make mistakes, but hopefully not the same mistakes."



**Pole, Nancy. “Collaboration among grant making foundations: A review of the literature.” Montreal Research Laboratory on Canadian Philanthropy, August 7, 2016. [https://philab.uqam.ca/wp-content/uploads/2017/12/WP14Foundations\\_collaboration\\_literature\\_review\\_final.pdf](https://philab.uqam.ca/wp-content/uploads/2017/12/WP14Foundations_collaboration_literature_review_final.pdf).**

Nancy Pole is a researcher and evaluator for PhiLab, the Montreal Research Laboratory on Canadian Philanthropy. This publication highlights the importance of planning and consequent execution that leads to successful collaborations. From reviewing the literature in the field, the author concludes that the most important factors that contribute to a collaboration’s success include:

1. Assessing the collaboration’s fit and funders’ own organizational readiness to collaborate
2. Defining appropriate and aligned purpose and partners
3. Developing adaptive capacities
4. Investing in strong, trusting relationships

At the same time, Pole cautions that philanthropic collaboration may amplify foundations’ capacity to set agendas that are not held publicly accountable and may reinforce inequitable power dynamics between grantees and foundations. Pole suggests further research engaging non-foundation stakeholders on the role that foundations are best positioned to play.



**Kabel, Chris. “Five Lessons on Successful Philanthropic Collaboration.” The Center for Effective Philanthropy, April 21, 2016. [www.cep.org/five-lessons-on-successful-philanthropic-collaborations/](http://www.cep.org/five-lessons-on-successful-philanthropic-collaborations/).**

Chris Kabel is deputy director of The Kresge Foundation’s Health Program. He is responsible for developing and executing their health team’s grantmaking and investment strategies to promote health equity. According to Kabel’s experience as part of the Grantmakers in Health partnership, the most important factors contributing to success are:

1. Keeping shared purpose top of mind to reduce fixation on smaller issues
2. Taking greater risks will yield greater rewards
3. Proactively leveraging voice and resources to strengthen the collaboration’s reputation and funding; for example, he mentions that Graham McLaughlin from the Advisory Board Company identified Brian Castrucci from the de Beaumont Foundation as a partner following a blog post by Castrucci
4. Aligning on governance practices up front
5. Determining the factors that will be deal breakers and those on which partners are willing to compromise in scenarios that require guidepost flexing

His publication sheds light on funder collaborations where funders are accountable to different sets of constituencies, a common scenario in philanthropic collaboration. Kabel’s writing also echoes, and to some extent synthesizes, a significant number of success factors cited in the literature.





**Porter, William, Kelly James, Robert Medina, and Barbara Chow.** “Funder Collaborations – Flourish or Flounder?,” *The Foundation Review* 9, no. 4 (2017). <https://scholarworks.gvsu.edu/cgi/viewcontent.cgi?article=1389&context=tfr>.

The authors are leaders at Education First and the William and Flora Hewlett Foundation, and reflect on their journey to use the emergence of the “Common Core Standards” as an opportunity for education funder collaboration. Beginning in 2012, funders worked together in multiple ways to support Common Core implementation. Collaborative efforts included knowledge networks, pooled funds, technical assistance networks, and even founding new organizations. This variety of collaboration examples provided an opportunity to learn why some aspects of this collaboration “flourished” and some “floundered.”

This article differentially explores how a collaboration can move through different life cycles, in this instance from knowledge network to a pooled fund. It also highlights pragmatic guidance, in particular about where collaboration efforts may falter. Key guidance includes:

- Identify the costs and benefits of partnerships before committing
- Identify and confront the distinct challenges at each “life stage”
- Collaborations “flounder” when funders aren’t clear at the outset about goals, metrics, problems to be solved, decision-making processes, and whether the collaboration has outlived its usefulness; in particular:
  - Creating a big tent can be inclusive, but can offer challenges when funders don’t explicitly tackle strategic differences—need to productively surface such tensions
  - When pooling money, it can be challenging to bring in funders once the big decisions about strategy have been made
  - It can be hard to make funding decisions in a timely manner given decision-making challenges (particularly when aiming for policy advocacy)
  - It is better to set time horizons at the outset to enable clarity on goals and exit



**Bokoff, Jen, and Cynthia Gibson.** “Funder Advocacy Collaboratives: Framing Thoughts.” *Grantcraft*, March 2017. <http://www.grantcraft.org/blog/funder-advocacy-collaboratives-framing-thoughts>.

Jen Bokoff is the director of Stakeholder Engagement at the Foundation Center, and Cynthia Gibson, Ph.D., consults for foundations and nonprofits on strategic planning, program development, and evaluation, and has written extensively on the intersection between philanthropy and advocacy. This article is part of a [suite of resources](#) focused on funder advocacy collaborations. Bokoff and Gibson note that less than 15 percent of foundation grantmaking supports policy, advocacy, and systems reform, and are hopeful that the uptick in funder collaboration can support increased philanthropic advocacy. When philanthropists engage in advocacy, Gibson and Bokoff highlight four crucial success factors:

1. **Specific goals:** Politics and policy can be dividing, so collaborations need to focus on a specific and shared goal in order to ensure everyone stays “on the same team.”
2. **Flexibility:** On-the-ground dynamics may rapidly shift, and it’s important that advocacy collaborations have money allocated to be able to support those on the frontlines quickly when necessary.
3. **Systems lens:** Rather than staying siloed into a program area focus, foundations should embrace complexity in order to promote systems change.
4. **Willingness to take risks:** Advocacy collaborations are going to have to embrace risks and may not see “immediate outcomes.”

While many of these success factors are important for collaborations more generally, these factors have heightened importance for advocacy collaborations. Finally, Gibson and Bokoff highlight a gap in the literature: Funders are increasingly interested in exploring how to “engage grantees as partners, rather than as beneficiaries, in strategic development, field building, and even grant decisions.”



**Buchanan, Phil. “Barriers to Funder Collaboration and the Will to Overcome them.” *Stanford Social Innovation Review*, May 3, 2017. [https://ssir.org/articles/entry/barriers\\_to\\_funder\\_collaboration\\_and\\_the\\_will\\_to\\_overcome\\_them](https://ssir.org/articles/entry/barriers_to_funder_collaboration_and_the_will_to_overcome_them).**

Phil Buchanan is the president of the Center for Effective Philanthropy. Buchanan has led the growth of the CEP to become a provider of data and insight on foundation effectiveness. His article, like the literature review written by Nancy Pole, sheds light on the interpersonal dimensions of collaboration and how these barriers can be addressed:

1. Buchanan suggests that funders should look less at private sectors as examples of silver bullets, which are driven by market and other forces.
2. He cites that as foundation leaders seek to demonstrate their accountability to corresponding constituents, they create unintended consequences; one of these consequences, he argues, is that it is a “fantasy” to believe there is always a definitive, causal link between an individual foundation’s funding and a quantifiable impact achieved; he further clarifies that this stems from “obsessive seeking” of individual credit, which could prevent productive collaboration.
3. He also believes it necessary to plan for power dynamics between funders and collaborators and funders and grantees, to foster more efficient communication and execution.
4. In order to address these dynamics, funders should be willing and able to participate in “good followership” and avoid seeking individual credit or over-attributing to one partner.

Finally, Buchanan shares two examples of successful collaborations, the Civil Marriage Collaboration, in which funders pooled \$153 million over 11 years to push for marriage equality, and the informal alliance among six education funders in California that helped change the state’s education finance system in 2013. His publication challenges funders to realistically identify the role they can play on a particular issue, the interpersonal dimensions involved in executing, and the need for “good followership” among funders accustomed to unilateral decision-making.



**Grady, Heather, Kelly Diggins, Joanne Schneider, and Naamah Paley Rose.** “Scaling Solutions Toward Shifting Systems.” *Rockefeller Philanthropy Advisors*, September 2017. [http://www.rockpa.org/wp-content/uploads/2017/09/05-18\\_RockPA-ScalingSolutions-WEB.pdf](http://www.rockpa.org/wp-content/uploads/2017/09/05-18_RockPA-ScalingSolutions-WEB.pdf).

Rockefeller Philanthropy Advisors was commissioned by the Skoll Foundation and supported by the Porticus, Ford, and Draper Richards Kaplan Foundations, to examine how funders can collaboratively work to “accelerate scalable solutions to the world’s most pressing problems” through systems change.

This research engaged 100+ funders and pulled five areas of consensus for funders aspiring to scale solutions by shifting systems:

1. **Empower:** It is the responsibility of funders to “consciously shift power dynamics with grantees” to create an environment that is open and honest.
2. **Accelerate:** Funders can and should have ongoing conversations with grantees about strategic non-monetary support that foundations can provide, such as introductions to additional strategically-aligned funders.
3. **Learn:** Funders can support grantees in developing knowledge on how to shift systems through activities such as systems mapping.
4. **Collaborate:** Funders should share learnings (e.g., due diligence and results achieved) with one another through vehicles such as donor collaboratives.
5. **Streamline:** Funders can and should amend grantmaking systems to lower the burden on grantees.

The report serves as an open source initiative, and its vision is to reach a wider circle of funders who are willing to commit to embody this behavior to drive “equilibrium change,” or the disruption of the status quo.



**Leland, Olivia.** “A New Model of Collaborative Philanthropy.” *Stanford Social Innovation Review*, November 15, 2017. [https://ssir.org/articles/entry/a\\_new\\_model\\_of\\_collaborative\\_philanthropy](https://ssir.org/articles/entry/a_new_model_of_collaborative_philanthropy).

Olivia Leland is a practitioner in philanthropic collaboration. She was previously the founding director of the Giving Pledge while working at the Bill & Melinda Gates Foundation, managing director of the Rockefeller Foundation, and is CEO of Co-Impact, which she founded in 2017. According to her publication, collaborations have three main benefits:

1. They create effective mechanisms to solve social issues at scale with the right partners and size of capital; Leland notes that capital aggregation is important to enable larger grants with less restrictive uses, and therefore supports flexible and coordinated investments to scale programs and interventions.
2. Through collaborations philanthropists are able to offer holistic support (e.g., technology, marketing, law, and coaching) in addition to longer-term, less-restricted, and larger funding; her organization, Co-Impact, plans to offer a suite of nonfinancial supports, including technical assistance for things such as strategic planning, program

management, technology, policy and advocacy, government relations, and measurement and evaluation.

3. Finally, collaborations can be mechanisms to allow philanthropists with less capacity (i.e. those without large foundations or family offices) to make “big bets” to find, vet, structure, and support investments in high performing organizations; for instance, she quoted the CEO of a small family foundation, who said, “If I want to write such a check, I don’t know where to write it. There’s no one to source and build out the opportunity or to support it over time.”

Leland’s vision is that collaboration will effectively target these gaps by building networks that catalyze increased giving and allow philanthropists to support potential and past grantees more effectively.



**Stachowiak, Sarah, and Lauren Gase. “Does Collective Impact Really Make an Impact?” *Stanford Social Innovation Review*, August 2018. [https://ssir.org/articles/entry/does\\_collective\\_impact\\_really\\_make\\_an\\_impact](https://ssir.org/articles/entry/does_collective_impact_really_make_an_impact).**

The Collective Impact Forum, an initiative of FSG and the Aspen Institute Forum for Community Solutions, hired ORS Impact and Spark Policy Institute to answer the question: “To what extent and under what conditions does the collective impact approach contribute to systems and population changes?” The study studied 25 collective impact initiatives, with eight site visit and three equity deep dives.

The study yielded key insights:

- Collective impact initiatives are a critical and valuable aspect of social change. However, there is no uniform role that collective impact plays.
- Systems change must be iterative, and there is not a simple, replicable path.
- Equity requires not only good intentions, but also targeted action, meaningful inclusion, and shifting power.

We believe that this study is unique for its approach to impact, conducting a cross-study of a large set of initiatives with clear, rigorous, and uniform set of criteria. We are eager to see a similarly rigorous study of funder collaborations.



**Milway, Katie Smith. “Funding Feedback.” *Stanford Social Innovation Review*, Fall 2018. [https://ssir.org/articles/entry/funding\\_feedback](https://ssir.org/articles/entry/funding_feedback).**

A case study of the Fund for Shared Insight, which aims “to help nonprofits and funders learn from and empower those they seek to help.” The study identifies four aspects of the collaboration’s process that enabled them to do something relatively rare: “collaborate with other funders not to scale a proven approach, but to design a solution with nonprofits

and their end users that could be adopted far and wide.”

1. **Identified “uncommon principles”:** The Fund is managed by an independent structure with dedicated staff; while funders contribute at different levels, they share leadership equally; participants engage candidly and embed evaluation along the way to support ongoing learning and adaptation
2. **Incorporated a large number of funders:** It raised \$21 million with 78 funders collaborating, funding 184 grantees; they did this through designing an online tool that could scale (using Net Promoter Score to gather beneficiary feedback) and offered that the Fund would pay 2/3 the cost for nonprofit implementation, assuming other funders would pick up the rest.
3. **Audacious goal:** The collaborative has adapted how it works to meet its goal—“not to address one social problem, but to elevate nonprofit and funder effectiveness in addressing any social problem” and will continue to “move from course correction to redesign to bully pulpit” in service of this goal.

The study also discusses how the Fund for Shared Insight grappled with equity, diversity, and inclusion by incorporating an EDI consultant as an advisor, ensuring diversity among the technical assistance staff, and increasing outreach in the Deep South.



**Kaufmann, Katherine, Laura Brookhiser, and Bradley Seeman. “Collaborating Towards Kindergarten Readiness at Scale: A Funder Group Case Study.”**

**The Bridgespan Group, 2018. <https://www.bridgespan.org/insights/library/philanthropy/kindergarten-readiness-funder-collaboration>.**

This is a case study of how a collaborative of 12 leading early childhood funders set a fixed goal and continuously evolved its methods to achieve it. In sharing the choices these funders made and the turning points they faced, this case study helps other funders chart their own course to successful collaboration.

The collaborative, formed at the invitation of the David and Lucile Packard Foundation and the J.B. and M.K. Pritzker Family Foundation, had adopted a straightforward goal: identify a few high-impact ideas to improve kindergarten readiness for all children, and find collaborative ways to advance them. Yet two years after the collaborative launched, the group still had not settled on any investments. Noting the lack of progress, the group’s principal convener, bluntly asked the group, “Should we stop meeting?”

Posing this question helped prompt the collaborative to alter course—and pick up speed. Eighteen months later, two teams within the group had pooled \$26 million to pursue big bets in two areas: strengthening the early childhood workforce of teachers and other professional care givers, and changing the standard of care in pediatric well-child visits. The two teams have invested much more in these strategies than any of the individual members would have on their own. And the full group, including some who have not invested in either the workforce or pediatric initiatives, continues to work to identify additional areas for collaboration.

The authors identify six key lessons learned through supporting this collaboration in its evolution:

- Assembling the right people took time.
- A compelling goal brought and kept people together.
- Learning together created a strong foundation for partnership.
- Identifying and supporting champions for concrete investment concepts translated talk into action.
- Collaborating effectively required a serious investment of time and resources.
- The most effective structure and approach for the collaborative was shaped by the field in which the collaborative operated and the issues that it tackled.

# Appendix

## A. Priority resources by theme

We have categorized many of the publications across three themes, which we encourage you to explore to learn more deeply on these topics.

### Lessons learned from case studies of specific collaboration

- Cheek Clayton, Tonika. “Engaged Partners: The Achieving the Dream Partnership.” Grantmakers for Education, January 2008. [www.edfunders.org/sites/default/files/CaseStudyNo.6\\_color\\_final.pdf](http://www.edfunders.org/sites/default/files/CaseStudyNo.6_color_final.pdf).
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## C. Illustrative list of funder collaborations

The 30 funder collaborations below include a range of collaborative fund types cited in the literature. They are intended neither to be comprehensive nor representative of the funder collaboration field. They are organized by funder collaboration type and chronologically within each type.

Fund name	Year est.	Issue focus	Geographic focus
<b>Alliance: Funders partner to exchange ideas and raise awareness</b>			
Grantmakers for Education	1995	Education	US
BC Freshwater Funders Collaborative	2014	Environment	British Columbia
California Common Core Funders Collaborative	2014	Education	US
<b>Coordinate or Match: Funders agree upon shared or complementary strategies, exchange ideas on an ongoing basis, and invest in aligned causes</b>			
Communities for Public Education	2006	Education	US
Big Bang Philanthropy	2011	Poverty alleviation	Global
True North Fund	2011	Youth development	US

Fund name	Year est.	Issue focus	Geographic focus
<b>Co-Invest: Donors to support a specific initiative or organization alongside one another</b>			
Great Bear Rainforest of British Columbia	2000	Environment	US
Central City Collaborative	2006	Community development	New Orleans
Pew Charitable Trusts Global Ocean Legacy	2006	Environment	Global
California Immigrant Integration Initiative	2007	Immigration	California
<b>Co-Invest: Donors to support a specific initiative or organization alongside one another</b>			
Campaign for Grade Level Reading	2010	Education	US
Silicon Valley Out of School Time Collaborative	2010	Youth development	US
The Grand Bargain	2013	Community development	Detroit
Collective Impact Project (Centraide of Greater Montreal)	2016	Community development	Canada
Art for Justice Fund (Ford Foundation)	2017	Criminal justice	US
<b>New-Co: Funders create and co-invest in a new entity or initiative that gives grants or operates programs</b>			
Robin Hood Foundation	1988	Poverty alleviation	New York City
Energy Foundation	1991	Environment	Global
Living Cities	1991	Urban development	US
NewSchools Venture Fund	1998	Education	US
Strategic Grant Partners	2002	Youth development	Massachusetts
Four Freedoms Fund	2003	Immigration	US
Charter School Growth Fund	2006	Education	US
ClimateWorks Foundation	2008	Environment	Global
Disability Rights Fund	2008	Human Rights	Global
Oceans 5	2011	Environment	Global
END Fund	2012	Global health	Global
Kigali Cooling Efficiency (K-CEP)	2016	Environment	Global

Fund name	Year est.	Issue focus	Geographic focus
<b>Fund the Funder: Funders invest in another funder with strong expertise in a content area</b>			
Security & Rights Collaborative (Proteus Fund)	1996	Democracy	US
Growth Capital Aggregation Pilot (EMCF)	2007	Youth development	US
African-American Cultural Heritage Action Fund (National Trust for Historic Preservation)	2017	Racial equity	US

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