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Community Foundation Strategic Alliances: Partnering for Impact and Sustainability

*A Discussion Paper for
Community Foundations of Canada*

As the network of Canadian community foundations continues to grow, the potential for regional community foundation collaborations also increases. The critical mass now achieved by the Canadian community foundation network presents new and important opportunities for strategic alliances and focused initiatives that may serve to significantly influence social issues while also advancing individual community foundations and the larger community foundation movement. As important, regional collaborations may also help to address the challenge faced by many communities of acquiring and sustaining the necessary human and financial resources required for a successful community foundation.

Community Foundations of Canada: An Examination of Regional Collaborations, May, 2007

The May 2007 discussion paper Community Foundations of Canada: An Examination of Regional Collaborations outlined the nature, rationale, and range of partnerships among community foundations in Canada, and recommended specific actions to help foster more opportunities for successful collaborations. In the two and a half years since its publication, there has been significant new collaborative activity that is demonstrating additional learnings about community foundation alliances, identifying promising practices, and providing new tools and resources to support community foundation partnerships, programs and practices. At the same time, the economic, social, and philanthropic context community foundations are operating in has added impetus to exploring new approaches to ensure that we will continue to thrive, including in times of dwindling resources and increasing need.

As part of its commitment to strengthening community foundation philanthropy, Community Foundations of Canada has an interest in:

- promoting the development of formal and informal learning relationships between community foundations;
- fostering the strategic employment of networks, partnerships and programs; and
- supporting activities that will help community foundations thrive in a changing and challenging environment.

This paper outlines recent collaborations and efforts to support them, delves more deeply into what we are learning about the key elements for successful partnerships, and identifies opportunities for CFC to further promote and support strategic community foundation alliances. It also highlights tools and resources, and refers to examples of agreements, terms of reference, frameworks and other documents that illustrate many of the elements and technical details involved in collaborative work. Although not intended to be an exhaustive survey of community foundation collaborations in Canada, it is hoped that the information provided in this paper represents an accurate current picture of the nature and scope of such partnerships, and the issues and opportunities they present.

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Executive Summary

The growth and maturation of the community foundation network and the current economic, social, and philanthropic context increases opportunities and impetus for strategic alliances among community foundations. Recent collaborative activity is demonstrating new learnings, identifying promising practices, and providing new tools and resources to support community foundation partnerships, programs and practices.

The potential for partnerships to increase the impact and sustainability of community foundations is being explored through a number of initiatives undertaken by organizations that are working at a broader level to advance and support collaboration:

- Vancouver Foundation’s innovative Community Foundation Partnership Program has provided numerous examples from British Columbia that illustrate how collaborations can share costs, increase impact, and create efficiencies and economies of scale.
- In Manitoba, The Winnipeg Foundation is seeking to build on its relationships with community foundations in that province and expand opportunities for shared programs and systems. Working together, Manitoba foundations have articulated principles for collaboration as a basis for moving forward with planning and partnering.
- The Council on Foundations in the US created IdeaLab to seed pilot projects aimed at supporting innovation through collaboration. Some preliminary results from funded projects are raising significant questions for the field and will no doubt generate serious debate, particularly relating to outsourcing comprehensive back office systems to for-profit companies, at regional or even national levels.
- Community Foundations of Canada itself experiences, models and supports community foundation partnerships through such programs as Community Foundations and the Environment and Vital Signs, as well as through coordination or facilitation of shorter term projects, such as the Simcoe County Community Foundations Hub Pilot Project.

Most partnerships between community foundations are focused on either programs and services, or administration and infrastructure. In addition, expanded coverage of geographical areas through the establishment of community funds creates partnerships between independent foundations and local entities that serve as community foundations.

Examples of each of these three categories illustrate the scope and scale, range of complexity, and outcomes of community foundation collaborations. From these experiences and the evidence that is increasingly available, we are learning about critical elements and steps of successful collaboration and areas of strategic opportunity, as well as the challenges and consequences of this work. We are also identifying and developing a number of tools, resources and activities, such as The Collaboration Spectrum and Collaboration Readiness Checklist, to assist community foundations as they explore and work through the development of partnerships.

CFC can play a key role in creating the awareness, leadership, knowledge, skills, resources and supportive environment necessary for community foundation partnerships to develop and flourish. But in addition to fostering collaboration, it will be essential to consider the implications of collaborative efforts on CFC as an organization and on the movement overall. For example, while CFC is encouraging the creation of community funds as a viable option to launching new independent community foundations, what are the implications for serving those entities? Should the community fund access CFC programs and resources directly, or through the “parent” foundation? What would happen if a community foundation didn’t provide the necessary support to ensure that a community fund was fulfilling its local roles of grantmaking, fund development and leadership in a way that is consistent with CFC’s Principles for Community Foundations?

If a collaboration reveals that a partnering foundation is deficient in a critical area, what should the response be, particularly if it relates to CFC's membership criteria? What are the risks involved if one or more community foundations outsource their administration and financial management to another foundation?

Because of CFC's position at the centre of the community foundation network, it is in a strategic position to identify trends, issues, opportunities and capacities, and to make connections among community foundations where there is promising potential for strategic alliances. But it will also be important for CFC to find the appropriate balance between leading or instigating strategic alliances, promoting collaborative ideas or opportunities, and supporting those that emerge from the membership. In some cases, CFC's role may be best served as leader, model, mentor, or coach; at other times as facilitator or even mediator.

In addition to the work that CFC is already doing to nurture collaborative cultures, capacities, and environments among its members, a number of focused activities could be undertaken to encourage, support and enhance strategic alliances. These include:

- Developing a comprehensive strategy to encourage and support community foundation collaborations with current and relevant research, training, tools and resources. This would include creating CF-LINKS workshops and webinars, Tips and Tools, community fund agreement, policy, and other templates, and possibly a fund to pilot innovative community foundation collaborations in priority areas. In addition, specific collaboration training and knowledge sharing for Regional Coordinators would allow them to use their role and relationships to help identify and facilitate partnership opportunities among community foundations.
- Collecting and disseminating information and learnings from CFC members engaged in partnerships with each other to add to the promising practices already identified and provide new tools and templates for use by other community foundation collaborations.
- Internally, engaging in more intentional documentation and assessment of collaboration processes in CFC program partnership evaluations, and further integrating collaboration into other CFC programs. Externally, connecting with other organizations interested in promoting collaboration for knowledge exchange and advancing collaborative practices in the field.

By thoughtful and intentional cultivation and support for the application of the elements, processes and tools for successful collaboration, and by continuing our learning and identification of promising practices, CFC will not only continue to be a thought leader around community foundation alliances, but an invaluable collaboration resource, partner, catalyst and practitioner.

Supporting Collaboration – A broader view....

Although most funding organizations encourage collaboration among non-profit groups, and sometimes even require it as a condition of a grant, few have been deliberate about supporting collaboration by recognizing and providing the time, space and/or financial resources necessary to the development of most successful partnerships. For community foundations, there has also been recognition of the value of strategic alliances and encouragement to collaborate with peers for program and operational activities. Until recently, however, there have been few efforts to explore and exploit the potential for collaboration to increase effectiveness and sustainability within the community foundation network.

Moving beyond the rhetoric, several organizations have undertaken initiatives aimed at fostering intentional collaborative efforts among community foundations. Although most are at relatively early stages, these efforts to support, pilot, and/or advance partnerships will provide valuable learnings that have significant potential to influence the entire movement.

➤ **Vancouver Foundation’s Community Foundation Partnership Fund**

In early 2008, Vancouver Foundation launched the Community Foundation Partnership Fund to provide financial support to regional collaborations and innovations across B.C. in three areas:

1. **Programs** - granting, Vital Signs, convening and community leadership, etc;
2. **Administration and Infrastructure** - shared technology, human resources, technical assistance, joint purchase programs such as insurance or audit programs, etc; and
3. **Marketing and Communications** - common strategies to reach specific and/or shared audiences.

The one year program provided \$95,000 to 9 projects that involved a total of 25 community foundations, several of which were involved in more than one project. In addition to the actual outcomes of the individual projects that received funding (outlined below in “Areas of Collaboration”), the Partnership Fund resulted in:

- new tools available to community foundations across the country;
- increased communication among community foundations;
- a number of new peer and mentoring relationships;
- joint training activities, such as with Income Manager;
- continuing discussions to explore potential partnerships; and
- new thinking about the opportunity and potential of strategic partnerships.

Also, being part of a partnership with other community foundations has in some cases exposed board members to different ways of doing things, or made them realize that their foundation is lacking in some areas, as it has introduced them to different approaches, practices and levels of board and staff engagement.

➤ **The Winnipeg Foundation**

In July of 2009, the Winnipeg Foundation hosted the Manitoba Community Foundations Workshop on Collaboration as an opportunity to explore the idea of sharing a back office structure to assist rural and northern community foundations. Building on initial discussion at the April 2009 CFC Regional Meeting, 43 participants from 17 community foundations attended

the workshop; foundations unable to attend were invited to submit comments and to provide feedback on the proceedings.

The workshop was seen as a starting point, and participants articulated several areas on which to base a continuing dialogue:

- recognition and appreciation for The Winnipeg Foundation’s programs and assistance for community foundations, and encouragement for continuation of services and support;
- potential opportunities to work together in a manner respecting local autonomy while ensuring reduced operating expenses, mitigated risks, trust, and accountability;
- a desire for continued dialogue on opportunities for collaboration to ensure momentum created through the workshop is not lost.
- nine principles that should define any future collaboration of Manitoba community foundations (see Appendix)

Next steps will include: discussion of the workshop report and response to key questions at community foundation board meetings; consideration of a Manitoba Regional Community Foundation meeting in 2010 and creation of a Manitoba Community Foundation listserv; establishment of an advisory committee to assist in exploring collaboration options; and completion and dissemination of the Scan of Community Foundations in Manitoba Research Report, which will give a clearer picture of Manitoba community foundations and their organizational structures, governance, endowments, community grants, and local benefits.

➤ **CFs and the Environment**

The Community Foundations and the Environment program, supported by the JW McConnell family Foundation and managed by CFC, includes local, regional and national projects that help community foundations work in partnership to tackle key environmental challenges. Through Kick-Start grants and peer learning opportunities, the Program has supported community foundations to:

- build local environmental endowment funds;
- increase the amount and effectiveness of grants to organizations working on environmental issues;
- provide environmental leadership by acting as educators and conveners;
- bring a sustainability perspective to all aspects of foundations’ work and operations; and
- encourage and facilitate joint work among community foundations to mirror the scope and complexity of environmental challenges.

As a result of the program, community foundations have to date:

- raised more than \$5 million in permanent environmental endowment funds;
- contributed more than \$2.6 million in grants to environmental organizations;
- created several regional partnerships with other organizations to approach; complex environmental challenges and raise public awareness; and
- engaged their youth councils in environmental learning and action.

The Program has demonstrated that environmental work is a clear forum for community foundations to work together and to collaborate with others. Environmental issues tend to transcend community boundaries, and changes in individual attitudes and action, as well as public policy, must occur at more systemic levels.

➤ **Council on Foundations: Idea Lab - Discovering innovation through collaboration**

To encourage greater collaboration and innovation among community foundations, the Council on Foundations' Community Foundations Leadership Team (CFLT) launched Idea Lab, a grants program to support innovation through collaboration. The Idea Lab grants are designed to eliminate the financial barriers to innovation, allowing participating community foundations to take measured risks and invest resources (time, experience, and dollars) to achieve high-value outcomes.

This new (2008) pilot grant program awarded a total of \$200,000 to five collaborative community foundation initiatives, with individual grants ranging from \$25,000 to \$50,000:

- Community Foundation of Westmoreland County - To investigate the feasibility of consolidating the back office operations of five southwestern Pennsylvania community foundations in an effort to reduce costs and increase quality.
- Connecticut Network of Community Foundations - To develop a process by which community foundations working together can impact a major policy issue in the state of Connecticut, specifically that of early childhood education.
- River Partnership of Community Foundations - To bolster the capacity of community foundations as place-based leaders and to affect change in their communities by organizing collaboratively around a shared national treasure - the mighty Mississippi River.
- Midwest Community Foundations' Ventures - To leverage the values of accountability and consistent performance of all community foundations by creating a model support system through regional associations to increase the National Standards for U.S. Community Foundations compliance and re-compliance.
- Arizona Community Foundation - To develop a series of affiliate training modules that are aligned with the National Standards for U.S. Community Foundations.

Although the projects are still underway, some of them are producing valuable results that have the potential to significantly impact the field. For example, the CF of Westmoreland County project group identified and documented three collaboration models and implementation options, and created a template for outsourced back office services to help foundations think about achieving cost savings and increasing efficiency. Their project report, "The Feasibility and Options for Consolidation of Back Office Operations", has been made available on the Council on Foundations website.

➤ **Midwest Community Foundations' Ventures**

In 2006, Midwest Community Foundations' Ventures (MCFV) was formed to build stronger communities through collaborative activities by community foundations. Operating as a supporting organization of the Council of Michigan Foundations, MCFV works in partnership with the three other regional associations in the area it covers: the donors' Forum in Illinois, the Ohio Grantmakers Forum and the Indiana Grantmakers Alliance.

Community foundations in the Midwest are facing several issues critical to the survival and growth of the region:

- promoting sustainable development
- retaining local and regional wealth for philanthropy
- strengthening the community foundation role of civic engagement

MCFV initiatives focus on advancing the innovation and growth of community foundations through researching opportunities, networking and learning from each other, providing technical assistance, promoting best practices, capturing efficiencies, and serving as a pilot region for efforts with potential for broader application. Led by a board of trustees and an Executive Director, MCFV has articulated the following values to guide the alliance:

1. MCFV seeks balanced representation from each participating state on the Board of Trustees and committees.
2. MCFV functions on the same operating principles embodied by the regional associations and community foundations—those of inclusiveness, openness, transparency and mutual respect.
3. MCFV prioritizes high-value needs/opportunities to drive program selection that will benefit all community foundations. MCFV acts on fact-based, data-driven, objective information.
4. MCFV encourages input from community foundations; MCFV will communicate appropriately and seek consensus.
5. MCFV leverages local community foundation investment with private funding.
6. MCFV leverages collective action—outcomes and value are greater than if completed individually.
7. MCFV models for the field best practices in collaboration and technology.

Areas of Collaboration – work on the ground

Most partnerships between community foundations are focused on either programs and services, or administration and infrastructure. In addition, expanded coverage of geographical areas through the establishment of community funds creates partnerships between independent foundations and local entities that serve as community foundations.

- **Programs and Services** – These partnerships may be for joint granting; fund development/donor services; convening and community leadership activities; marketing/communications; or for program delivery, such as Vital Signs. They are usually short-term or time-limited, but may become long-term or on-going programs.
- **Administration/operation/infrastructure** – “Shared back-office” partnerships may include collaboration in one or more areas, such as technology, human resources, office space, financial management, and/or investment management. They are usually intended as long-term alliances, but generally include a trial period, and dissolution clauses.
- **Community Funds** - These advised or designated funds are held by a community foundation and earmarked for specific communities, usually, but not always, outside the community foundation’s service area. The community funds undertake grantmaking, endowment building and community leadership, but leave administration, investment and financial management to the “parent” community foundation. In some cases, the parent community foundation serves as an incubator, and the community fund has the option to become an independent foundation if it so chooses.

Most of the community foundation collaborations outlined in the 2007 discussion paper continue today, although in some cases they have evolved to suit changing situations. The initiatives outlined here are more recent partnerships, and most have been supported by the programs outlined above in the section “Supporting Collaboration”.

1. Program/Service Partnerships

➤ Lake Winnipeg Watershed Initiative

In 2006, 16 community foundations attended a two-day meeting to discuss the visibly deteriorating quality of water in Lake Winnipeg, the world's 10th largest freshwater lake, and the disturbing signs that the entire watershed is under stress. Through the resulting Lake Winnipeg Watershed Initiative, a growing number of foundations are joining together to think about how foundations can be most effective in raising awareness about water issues in Western Canada and how foundations can play their part in supporting and leading change.

The project's objectives are:

- To raise public awareness of the crisis in the Lake Winnipeg Watershed; and
- To determine the role that community foundations and other funders can play in improving conditions in the watershed

To date, the project has resulted in:

- Community foundations and other funders, including the Walter and Duncan Gordon Foundation, the Thomas Sill Foundation, and the J. W. McConnell Family Foundation through CFC contributed toward the hiring of a part-time staff person to enhance their ability to understand the issues facing the Watershed and develop a strategic framework for coordinated action.
- Planning for a public education campaign is underway.

Working in collaboration on this issue has allowed foundations to build their understanding of the issue, as well as relationships with other stakeholders, in a way that few would have had the capacity to do individually. The partnership has also allowed the project to continue to build momentum, even in periods when some of the foundations are not giving it any focus or energy for a period of time. Another advantage is that the partnership brings more thinkers and creativity in to the mix - which is always a good thing - and that once one of the participating foundation does something bold, others will be more likely to jump on board.

➤ Ontario Land Trust Alliance

Care for the Land You Love, a partnership between the Ontario Land Trust Alliance (OLTA) and Community Foundations of Canada, is a province-wide campaign to raise awareness and funds for the ongoing stewardship of preserved lands in Ontario. Community foundations and land trusts are working together to identify potential donors to contribute to new local Land Stewardship Funds. The endowment funds, established by the local community foundation, will create a permanent source of revenue for local stewardship activities. Over two years, 20 community foundation and land trust pairs will be participating in the program.

Although the partnership includes land trusts as well as community foundations, it is worth noting that from the community foundation perspective, the collaboration provides much more than the opportunity to work with land trusts and create stewardship funds – it compels the CFs to both work as a network, and project as a network, and makes them more aware of the broader community foundation movement and their place in it. The partnership has allowed CFC and OLTA to obtain a major grant from the Ontario Trillium Foundation. One selling feature of the grant proposal was that working together would create leverage and increase environmental impact.

From an external perspective, the common communications material and consistent concurrent messaging is raising the profile of all CFs, which have been pleasantly surprised at

the extent of media pick-up. As with other community foundation program partnerships, “the whole is greater than the sum of the parts”.

➤ **Vital Signs**

Vital Signs is an annual check-up conducted by community foundations to measure the vitality of communities across Canada. It gathers and publishes data on significant social and economic trends and assigns grades in areas critical to quality of life. The annual Vital Signs reports promote awareness of community issues and are used by communities for social planning, by citizens and philanthropists to identify community needs and strengths, and by community foundations to inform their grantmaking and leadership activities.

There are two community foundation Vital Signs collaborations; each formed for a different purpose:

- For the third consecutive year, the Cambridge North Dumfries and the Kitchener Waterloo Community Foundations have partnered to produce Waterloo Region’s Vital Signs Report. The two foundations serve adjacent communities that make up the Waterloo Region, and have found that collaborating on Vital Signs is not only cost effective, but practical, since the Region of Waterloo is the body which is responsible for policy and funding decisions for most of the key areas covered by Vital Signs. And since census information is collected primarily on a regional basis, separate reports would require special data runs for each community in the Region – a prohibitive cost for the two foundations.
- In British Columbia, three community foundations are working together to deliver Vital Signs in their communities through a collaborative effort aimed at making the program more accessible and affordable to each of them. By sharing such expenses as the research contract, publication design, and printing costs, the Central Okanagan Foundation, the Phoenix Foundation of the Boundary Communities, and the Sunshine Coast Community Foundation are finding that they can achieve significant cost savings, while still having their own unique Vital Signs program and report. In addition to its cost-effectiveness, the partnership has also benefitted the participating community foundations by providing a built-in peer learning group, and the tools and templates developed in the pilot are also available for use by other community foundations.

➤ **New Brunswick Poverty Reduction**

In the spring of 2009, New Brunswick’s Deputy Minister of Social Development convened a meeting of all community foundations in New Brunswick along with CFC’s CEO and Atlantic Regional Coordinator to discuss the work of community foundations in meeting local needs, and to consider ways to enhance their efforts in poverty reduction. The meeting was part of the development of a province-wide strategy that will engage government, the non-profit sector, the business community and individuals in working together to reduce poverty in the province. Community foundations are recognized as an integral partner as the strategy unfolds, and their participation may also serve to foster more collaboration between community foundations, providing peer learning, joint granting and other strategic partnership possibilities.

➤ **Starting the collaboration conversation in southwestern Ontario**

In Southwestern Ontario, the new executive director of the Windsor Essex Community Foundation wanted to get acquainted with his neighbouring community foundations, and so invited representatives from Sarnia, LaSalle, Chatham-Kent, and Grand Bend, as well as CFC’s Regional Coordinator and the Program Manager of the Ontario Trillium Foundation.

While the intent of getting together was to meet each other and share ideas and information, the conversation quickly turned to collaboration. The group talked about collaborative granting, potential sharing of resources, as well as collaborating with others i.e. United Way and other funders in the region. The Trillium Foundation is keen to see this type of discussion take place and is encouraging collaborative grant requests.

This initial meeting was about two hours long and the group agreed to meet again in January, 2010. CFC's Ontario Regional Coordinator is planning a sub-regional meeting in this area in the spring, possibly linked with a Trillium meeting with local charities. Agenda items will be determined by the group, but foundation partnerships will no doubt be included.

➤ **Marketing and Communications**

- **Joint professional development, and “Wills Tour”**- A meeting of six Kootenay area community foundations (Cranbrook, Creston-Kootenay, Osprey, Kimberley, Columbia Valley and Nakusp) organized by the Cranbrook and District Community Foundation created an opportunity for joint professional development, as well as exploration and identification of further opportunities for collaboration. In addition, this initiative included outreach to neighbouring communities that are considering development of a community foundation. As a result of the meetings, relationships have been formed between and among several CFs leading to further discussion of information sharing/mentoring/peer learning with respect to existing and potential funding partnerships, and exploration of opportunities for shared operational activities.

An additional outcome was the identification of the opportunity for the foundations to host planned giving seminars in their communities, and by working together, share the costs and some of the organizing involved. Thus, Cranbrook, Creston-Kootenay, Osprey, Phoenix, LeRoi, Kimberley, Columbia Valley, Golden, Revelstoke and Nakusp CFs participated in the Wills Tour project, which provided a professional presentation on estate planning and philanthropic giving. The Wills Tour helped the foundations to learn more about planned giving, build relationships with professional advisors, increase their profile, and gain experience in convening.

- **Philanthropy Day** - Maple Ridge, Port Moody, Mission, Coquitlam and Pitt Meadows Community Foundations in the Metro Vancouver area not only share borders and local media outlets, but also many residents who work, live, obtain services and use professional advisors in more than one of the municipalities. After meeting several times to discuss how they could work together for their mutual benefit, they decided to undertake a National Philanthropy Day joint marketing initiative. Although each foundation was responsible for determining what other local activities they would undertake in conjunction with the campaign, they shared the costs of developing and printing newspaper ads, along with ideas and tools such as proclamations, letters, event invitations etc. The outcomes included cost-savings; increased publicity and profile; new relationships among the community foundations, media, local municipalities, and other groups; and a second partnership between two of the community foundations, as well as several new gifts to some of the foundations.
- **Website Template** - When they needed to develop a new website, Phoenix Foundation of the Boundary Communities, engaged the Sunshine Coast, South Okanagan, Maple Ridge, Kimberley and Cranbrook CFs to help advise on the creation of a template for community foundations that wanted to develop a new website that could easily be maintained and updated by their staff or board members, without requiring external consultants or services. The project resulted in a website template, including instructions, that is available at no charge to any interested community foundation.

2. Administration/Operational Partnerships:

- **Administrative hub exploration** - With encouragement and support from the Trillium Foundation, the four community foundations in Simcoe County- Huronia, Orillia, Barrie and Bradford - explored the potential for shared administration through a facilitated process. Their project objective was to deliver a recommendation and action plan aimed at strengthening existing community foundations in Simcoe County and relieving pressure of operating costs through more effective administration and economies of scale using existing community foundation structures.

While the ultimate outcome will ideally be the development and implementation of an administrative hub serving four community foundations, the initial project was limited to researching relevant partnership models and promising practices, facilitating discussion and building consensus, and recommending a course of action. Interviews, surveys, facilitated discussion, and the provision of background information, including research and case studies, were intended to:

- provide the community foundations with information and options so that they could learn from the experiences of others and make an informed decision;
- build relationships and consensus among the project participants;
- identify issues, challenges, and opportunities;
- surface attitudes and perceptions;
- articulate principles for working together and minimum specifications for a partnership agreement; and
- develop a framework for the proposed partnership, and action plan for moving forward.

The detailed action plan that was agreed to was intended to form the basis for a grant application to the Trillium Foundation for a multi-year project that would pilot an administrative hub to support the four community foundations. However, the board of one of the foundations became concerned that it may end up taking on too much of the responsibility for management of the partnership and decided to step back. This turn of events slowed developments down considerably, though there are now renewed plans for moving ahead, albeit in a different way.

- **Management agreement** – Although its name doesn't reflect it, the Guelph Community Foundation serves all of Ontario's Wellington County, including the communities of Elora and Fergus, which comprise a township now known as Centre Wellington. For about 5 years, Guelph CF worked with Centre Wellington to develop a community fund, but once Centre Wellington made the decision to become an independent foundation, the relationship evolved to more of an affiliate arrangement. Guelph CF's board was very cautious in proceeding, and the management agreement that was eventually signed took much iteration to complete, but the question of "what if we don't do this" helped to move the process forward. At the same time, Centre Wellington was very cognizant about avoiding administrative duplication.

Under the agreement, Centre Wellington contracts with Guelph CF to act as administrator and essentially provide a back-office function. Guelph also provides guidance in other areas, and although Centre Wellington is not a member, this arrangement has brought them into the CFC fold, ensuring they are exposed to CFC's principles, practices and resources. The relationship is still in its infancy, and some details have yet to be worked out, but both parties recognize that it's an evolving process and that beyond an incubation period, Centre Wellington may eventually go on its own, or it may always remain an affiliate of Guelph Community Foundation.

- **Shared financial management** - When the Community Foundation of the South Okanagan experienced some on-going challenges related to their contracted bookkeeping, their neighbour, the Central Okanagan Foundation, was able to offer the assistance of their finance manager, who had the time available and was skilled in community foundation financial systems and requirements. The shared bookkeeping project that resulted aimed for a cost-effective approach to financial management, while also developing relationships and mentoring between staff and boards. After nine months of working together, the two foundations decided, for various reasons, including the difference in organizational cultures, not to continue with the pilot project.
- **Learning together** - The Community Foundation of Whistler, after several meetings of the six “Sea to Sky” area CFs, convened a day of professional development on the topics of governance and fund development, identified as priorities by the group, which also included Squamish, Sunshine Coast, Bowen Island, West Vancouver, and North Shore. Participants agreed on the importance of such a session to initiate relationships among the participating CFs, and have now planned a meeting to explore the potential for an administrative partnership.
- **Starting a dialogue** – In suburban Vancouver, “Ridge Meadows” is an area that shares a hospital, school district and many other programs and services, although it is made up of two separate municipalities. Maple Ridge, with a larger population and land base, often overshadows Pitt Meadows, its smaller neighbour. But residents of Pitt Meadows are very protective of their separate identity, as is the city’s community foundation, one of CFC’s newest members. As a result of partnering on a Philanthropy Day project with Maple Ridge and three other community foundations, the Pitt Meadows CF board agreed that there could be significant benefit to increasing their connections with their Maple Ridge peers, and so the two foundations engaged in a facilitated process to explore the potential for a strategic partnership.

Despite the firm belief of both community foundation boards prior to the meetings that they were unique and different from each other, everyone was amazed at the end of the first joint meeting how many common concerns, goals and challenges they had. As the two groups began to identify possibilities for collaboration, the energy built and excitement spiralled. Old perceptions began to fade away, and both sides recognized kindred spirits whose commitments to their communities ran deep. The foundations have committed to undertaking three joint projects over the next year partnership, and will commence with a joint professional development session in the fall (2009).

3. Community Funds

In the past few years, community funds have become a viable option for many smaller communities that are interested in having a community foundation in their area, and their numbers have increased accordingly. Although a number of larger, more established community foundations have held community funds for some time now, the growth in this area appears to be among newer community foundations to serve primarily more rural areas. Endowment matches, cost-effectiveness, and flexible options, such as retractable funds, have made community funds a more attractive alternative to launching an independent foundation, particularly when structured so that local profile and engagement are priorities.

- Community Foundation of Nova Scotia, started in 2007, now holds funds for Wolfville, Yarmouth, Bridgetown and Annapolis Royal, and anticipates that they could add six to eight more viable community funds in the next five years. Although they don’t have an active strategy of promoting such funds, CFNS believes they have resonated well, possibly because they focus attention away from individuals, having found that Donor Advised Funds are a tough sell in the region. The four current funds were established largely as a result of an

existing connection to CFNS – a board presence in the area, a friend of the foundation, or a neighbouring community.

Each community fund is represented locally by an average of five people who form a standing committee reporting to CFNS’s board. Although not required by policy or by-law, the four communities are quite broadly represented on CFNS’s seven member board, with several members having been recruited from the community fund committees. The fund agreements include roles and responsibilities and quasi terms of reference for the local committees. As with most community funds, the local group focuses on endowment building, grantmaking and leadership activities, with guidance in those areas provided by the community foundation, along with all administration, and financial and investment management.

- Prince George Community Foundation, now fourteen years old, has seen a growth in community funds largely as a result of an endowment match program offered by BC’s Northern Development Initiatives Trust. The funds include Burns Lake, Valemount, McBride, Salmon Valley - Lakes, Willow River – Upper Fraser, Hixon - Woodpecker, and the City of Prince George, each of which received \$25,000 per year for two years on a one-to-one matching basis, allowing them to quickly grow to \$100,000. PGCF charges a 0.5% administration fee on these funds, which are fully retractable at market value should the community decide they want to go on their own. The fee, however, doesn’t cover the cost of managing the funds and providing the support required at the local level. The communities are not required to have a legal society or other formal structure in place, but are expected to have a grants committee and to market their fund to ensure it grows. The local villages are qualified donees and can be the recipient of the allocation from the fund, which they can then disburse to the grant recipients.

Although the creation and support of the funds is an evolving process and PGCF and the partner communities are learning as they go along, all have been positive experiences so far, and are seen as tremendous opportunities for all concerned. PGCF points out that there is considerable wealth and community spirit in the region, and that the local mayors and village councils usually know who to tap for their first \$25,000 match to get things started. They have been very creative with their fundraising efforts and their supporters have been most generous. PGCF maintains an arms length relationship with the local groups, and doesn’t get involved in the grants adjudication, however is hoping to facilitate more capacity building among the community funds to ensure good practice in grantmaking and fund development. They want to be flexible, and try to make any such opportunities work, but also want to make sure they “get it right”.

Research on Community Foundation Collaboration

There is little research available on collaboration among community foundations in Canada, and even in the US the documentation specific to collaborative processes and models that is readily available is largely focused on administrative and operational alliances, and on regional and affiliate approaches. And although there is now considerable attention given to structures and strategies to provide cost-effective coverage of territory by community foundations, the actual implementation and evaluation of various approaches is relatively recent. Thus, there has been little documentation, comparison and analysis of such aspects as governance structures, policies, and procedures among different foundation alliances. Preliminary research indicates that these functions and approaches seem to differ significantly, not only from one community foundation to the next, but also at different stages and times within the same foundation. It is clear that there has been considerable flexibility, evolution, and hybridization, and that the choice of partnership model has been determined by a wide variety of factors. In short, it is evident that “variation rules!”

While there is little in the way of standard “models”, analysis of many of the experiences to date provides valuable and rather consistent insights into elements of successful collaborations and identification of promising practices and useful tools. Some studies have also provided financial data pertaining to cost savings and endowment growth, and other information regarding quantitative as well as qualitative outcomes. The most relevant work includes:

- **“Better Together: Regional Alliances and Small Community Foundation Sustainability”** – This 2005 study of regional alliances and community foundation sustainability was conducted by the Michigan Council on Foundations and others, and funded by the Aspen Institute and the Charles Stewart Mott Foundation. It studied 34 community foundations in 5 active alliances, and also compiled information from 210 CF survey respondents, and obtained informal input from 50 CF staff and board leaders.

The research concluded that “alliances have the potential to reduce community foundations’ operational costs and increase organizational capacity, thus strengthening their prospects for sustainability.” Specifically, the site study of the five community foundation partnerships found that they had opportunistic origins - forming around an ability to strategically assess and respond to organizational and marketplace needs. They resulted in a focus on quality - improved services provided in core operational functions, and in asset growth - increased visibility, credibility, and availability of resources (time, funds, relationships). The study further identified the following:

factors for success:

- Leadership
- Persistence
- Flexible arrangements
- Respect for local expertise

and barriers to success:

- Turf issues
- Key people leaving
- One partner feels others no longer share values

The study also reported the following findings from the larger survey of 210 community foundations:

- Nature of alliances: 43% were for marketing or communications purposes; 40% for uniting regional philanthropy; and 17% for increasing assets.
- Degree of Benefit: 26% were thought to be extremely beneficial; 35% very beneficial; 23% moderately; and 10% not beneficial.
- Costs: 14% were motivated by lowering costs, while 43% reported an actual decrease in costs.

The top 4 challenges cited by the respondents were:

1. Loss of local autonomy/local control (39%)
2. Loss of identity (33%)
3. Competition for donors (30%)
4. Increased administrative/operational costs (20%)

The most important factors in sustaining collaborations were found to include:

- Each participant receiving benefit and participants’ willingness to partner (79%)
- Strong and consistent leadership
- Mission alignment among partners
- Retaining local autonomy

The study concluded that alliances have field-wide potential, and thoughtfully implemented and monitored, successful alliances can:

- Help the community foundation field at-large increase its ability and capacity for philanthropy building (71% of respondents)
- Help build public trust and credibility for the sector (59%)
- Help philanthropy come together on other issues (49%)
- Reduce CFs' operational costs
- Increase organizational capacity
- Increase assets
- Improve accountability
- Leverage CF funds, resources and knowledge
- Strengthen regional voice and policy presence
- Unite philanthropy on a regional level

Community Foundation Alliance (Indiana)

The Community Foundation Alliance exists to provide leadership assistance and support to member community foundations as they promote philanthropy and build endowment to serve their communities.

Early organizers believed a regional structure could provide greater benefits to individual members at lower costs. The Alliance's region encompasses Davies, Gibson, Knox, Perry, Pike, Posey, Spencer, Vanderburgh, and Warrick counties. Each county is represented by a community foundation — an Alliance member— serving the local community.

Together, we work to promote philanthropy at all levels, to build and maintain a permanent collection of charitable funds that benefit the entire community, and serve as a trustworthy partner and leader in shaping effective responses to community needs.

Each of the Alliance's member foundations is made up of a collection of endowed funds established by donors from all walks of life and generally focused on charitable endeavors in their own - communities.

CFA's major tenet is "equal voice in governance, with individual identity for each county and strong regional communication." Each of the nine foundations has representation on the Alliance board, and receives services from a central shared back-office, including administration, marketing, development and grantmaking, for which they pay 1% of their annual endowment.

Audit efficiency alone is estimated to save the Alliance \$16,500 annually. Alliance partners have raised more than \$50 million for the region, supported regional education initiatives, and provided a coordinated regional voice. While a strong collective effort, the alliance struggles to retain local leadership, identities and priorities.

From "Better Together" and Community Foundation Alliance website

Better Together: *Regional Alliances and small community foundation sustainability* - Summary of Results for participants in five sites studied

Site	Services shared	Savings experienced	Capacity expanded	Other benefits
Southwest Michigan Alliance	Accounting, investing, auditing, FIMS (Financial Information Management Systems)	Lower audit cost Lower investment fees	Raised control and quality of services Achieved common, high level of data accuracy and maintenance	Growth in number of local FIMS-trained professionals
Community Foundation of the Upper Peninsula (Michigan)	Consolidated back-office, including accounting, investing, auditing, FIMS	Lower audit expense Reduced investment fees Lower operating expenses	Pooled scarce resources for greater back-office functionality Increased time spent by local staff on asset growth and grantmaking Improved reporting timeliness, accuracy and consistency Enhanced trust and disclosure	Alliance expanding to include and/or serve new community foundations in region Building collective trust and regional mindset Endowment growth accelerated
Community Foundation Alliance (Indiana)	Centrally managed back-office, marketing, development, grantmaking functions	Reduced administrative costs Lower audit costs Reduced investment costs	Created higher quality of investment and other services Expanded philanthropic services in region	Significant funds raised in region A coordinated regional voice attracts outside funding
Humboldt Area Foundation (California)	Central administration, governance, marketing and program support	Low administrative and staff cost	Created local infrastructure for community philanthropy Increased time/energy for local asset and community development	Mentoring of emerging community leaders and organizations Regional scope and relationships advance regional agenda New local donors attracted by community-based affiliate funds
New Hampshire Charitable Foundation	Central administration, governance, marketing and program support	Low or no local office cost	Allowed local staff to work on asset development and specific local needs Attracted national funder investment in local philanthropy	Rapid growth of local funds Brad engagement and increased number of people involved in community philanthropy

➤ **The Feasibility and Options for Consolidation of Back Office Operations** - In 2009, this report was made available by the Council on Foundation's Community Foundation Leadership Team on one of the projects funded through the Idea Lab grant program. The project explored the potential for consolidation of back office operations among seven community foundations in Pennsylvania, and the report provides valuable research, insights, tools and resources for other foundations considering such an operational alliance.

Three *collaboration models* were identified and documented, with several case studies provided for each:

1. **Consolidation:** Merger of organizations into a single entity.
2. **Umbrella:** One foundation provides an “umbrella” of core administrative services to other foundations.
3. **Affiliate:** A lead community foundation provides service to local and regional affiliates that operate as component or community funds of the lead foundation.

Implementation options were also identified:

- **Local:** systems standardized locally to reduce costs, facilitate transactions, and streamline processes.
- **Regional:** A host foundation works with individual community foundations that wish to maintain their individual identity and external operations.
- **National:** Similar to the regional approach, but with many community foundations participating, regardless of geographic location.

The project group created a template to help foundations think about achieving cost savings and increasing efficiency, and recommended options for community foundations considering consolidated back office operations:

- Conduct a review of the research provided to see what may be helpful for your community foundation.
- Complete a methodical cost/benefit analysis to discover where efficiencies could be implemented.
- Begin discussion with critical staff and board members regarding implementation options.
- Convene interested parties from foundations (yours and others) to explore further.

The research and the issues raised in the report provide valuable new knowledge and insights about current community foundation operations, shared administration/operational models, and potential commercial vendors and partnerships. The recommendations will no doubt generate considerable debate in the field, particularly those concerning large-scale regional or national outsourcing of community foundation functions to commercial firms.

Three Foundations in One: The Central Minnesota Community Foundation

In 1985, the Central Minnesota Community Foundation was launched in St. Cloud to serve four counties in central Minnesota. In 1997, the Foundation was approached by two new communities that were interested in having a community foundation: Brainerd and Willmar, each an hour away. Subsequently signed on as affiliate foundations, each community created a board of directors and obtained charitable status, then entered into a five-year renewable agreement with the Central Minnesota Community Foundation to provide staffing, administration and investment support. Both have recently renewed their agreements for another five years.

While the Central Minnesota Community Foundation president, marketing, grants and administrative staff provide services from their office in St. Cloud, Brainerd and Willmar Community Foundations are each also served by a half-time affiliate coordinator who live and work in the community. They each also have a representative on the Central Minnesota CF Board of Directors.

Brainerd and Willmar each pay 1.1% administration fee on their funds held with Central Minnesota, and apply their own investment policies to the funds. No other fee is charged for the services they receive from Central Minnesota CF and most costs are covered by a private foundation, including funds to upgrade equipment and systems, and challenge grants. Brainerd and Willmar each now have over \$4m in assets.

From Central Minnesota Community Foundation website

The Process of Collaboration – Reflections and Resources

It is clear that the learnings and reflections identified in the original 2007 Discussion Paper on community foundation collaborations continue to hold true for the collaborative work undertaken or examined since then:

- The need for flexibility in developing a partnership, and the willingness to change what isn't working, even at times, discontinuing the relationship.
- What works in one community foundation, does not always work in another community foundation. Even within the same community foundation, success may vary from one partnership to another.
- It is possible to build a successful regional model more on marketing and communications rather than on a regional governance and committee structure.
- Personalities and relationships are often an important determinant of successful collaborations.
- Collaborations must be adequately resourced to be effective.
- Board knowledge and engagement are important, even in well-staffed community foundations, and appropriate support must be given to volunteers.
- A number of community foundations are expending significant human and financial resources to support other community foundations in a variety of ways because they believe it is the right thing to do.

- Good communication is critical to successful collaboration. It is also often helpful to keep other neighbouring community foundations in the loop, even when they are not directly involved.
- Collaboration takes time. The investment in relationship and trust building, consultation, board engagement, and planning may be lengthy and time consuming, but usually results in a more successful partnership.

But several additional reflections can be added, based on closer examination of earlier and current collaborations and research:

- Common purpose can be cause for initiating relationships, and short-term projects can build relationships and momentum that may result in bigger goals and longer-term projects and partnerships.
- Although all parties may not initially come to the table with the same vision, agreement on a shared vision is required early to encourage continued investment in the process.
- It isn't necessary that collaboration partners have the same organizational values and cultures, but it is important that they be compatible, and that their work together can be guided by agreed upon principles and standards of conduct.
- External funding may be critical to enable some collaborations to take place, however money should not be the sole or primary motivator for the partnership.
- Collaborations usually require detailed disclosure of information, sharing of data, and examination of work systems and styles. Working together may uncover serious problems in the policies and/or practices of one of the partners that might not only jeopardize the partnership, but could also affect the foundation's reputation and credibility, or its status with regulatory agencies. Anticipating the possibility of such situations, and being prepared to address them should they arise can be critical to minimizing the potential for damage.
- The most durable partnerships start from the ground up, and not from the top down. Although encouragement and support from external parties can be invaluable, the decision and delivery on collaboration must be owned by the participants, and they must be intimately involved in all aspects of planning and implementation.
- Board buy-in is essential and it must be authentic- it cannot be achieved by only *informing* board members about the collaboration and providing them with print information to guide their decision-making; they must also be *engaged* in the process. It is not enough to have one or two board members acting as representatives on a steering or planning committee and serving as information conduits -tools and strategies such as questionnaires, interviews, scenario-planning, SWAT or SCORE analyses, and the collaboration spectrum must be used to get board members engaged in a meaningful way and understanding the various dimensions of collaborative work.
- Even with a well-informed and engaged board, effective leadership is still required to build and sustain interest, commitment and momentum. Without leadership to inspire, activate, and guide, participants may lose sight of the bigger vision, and default to self-interest.
- The amount of energy and/or resources that each partner can contribute may vary at different times, and flexibility may be required to accommodate such variation.

However, if diminished participation adversely affects the work of the partnership, or if the commitment of a partner wanes, the situation must be addressed and remedial measures explored and implemented.

- There are times where collaboration is not appropriate, or the potential benefits are not worth the investment of resources, and it's important to recognize such situations early on. There are also times when a partnership is not intended to be long-term, and should be allowed to run its course when its work has been completed.

Boiling it down to basics.....

Guidelines for success (adapted from *"Building organizational capacity through strategic collaboration"* by Ron Robinson, March 2002, *Front and Centre, Canadian Centre for Philanthropy*)

- Know your organization
- Be honest and transparent about intent
- Stay true to mission, vision and values
- Crawl, walk, then run
- Choice of appropriate structure
- Clear and transparent process
- Intentional relationship building and maintenance- at all levels and as a priority
- Attention to promising practices
- Celebrate successes, however small
- Inject hope, confidence, persistence and resilience
- Share credit widely
- Communication, communication, communication
- Focus on solutions; engage in collaborative problem solving
- Make creative use of diverse viewpoints when difficulties arise
- Review reasons for partnership regularly
- Be willing to walk away
- Do a few collaborative partnerships well

Elements of Successful Collaboration

As earlier noted, while the *structures and activities* involved in the three areas of collaboration discussed are many and varied, the *process* involved in successful partnerships includes common elements that must be present, regardless of the type of work that is being undertaken. These elements, including **intention, commitment, leadership, relationships, trust, and flexibility**, are usually an essential part of the decision to partner, but must also be integrated into the planning, implementation, and maintenance of the collaboration. Their importance will vary depending on the nature and complexity of the partnership, and whether it is intended to be time-limited or on-going.

Intention – Whether aimed at increasing efficiency, effectiveness, impact, resources or service area, the motivation for partnering may vary by situation, organization, and even timing. Once motivated organizations connect with each other and share their interest, the process of collaboration becomes more intentional, and through dialogue and exploration of possibilities, starts to focus in on a shared vision. But there must be common interest and intention for parties to come to the table and become invested in the process in the first place.

Commitment - Once participants agree on a shared vision, there must be commitment to it by all parties for each to continue to invest their efforts and resources. This can be a lengthy and complicated part of the process, as it requires garnering buy-in and ownership at all levels, both informally and formally. Informally, this means engaging board, staff and possibly donors and other stakeholders through such activities as dissemination of information, facilitated discussion, confidential surveys, and interviews. Formal commitment may include development and approval of documents such as memorandums of understanding, joint agreements, terms of reference, etc. and their board ratification.

Leadership – Because collaboration is often an attempt to do something new, and the process and outcomes may be uncertain, it requires leadership that is comfortable with risk, ambiguity and change, and that can help other participants also become comfortable. The heightened level of trust that is critical to successful partnerships requires superior communication and interpersonal skills; the attention to content issues necessitates solid knowledge about the topic of the partnership and strong organizational skills.

On the Brink of New Promise describes “the need to replace the mindset that has guided the community foundation field to this point with new assumptions about what constitutes success, and that the leadership task for community foundations lies in creating three subtle but significant shifts in assumptions and priorities:

- A shift in focus from the institution to the community
- A shift from managing financial assets to long-term leadership
- A shift from competitive independence to coordinated impact”

Relationships and trust – It’s obvious that partnerships are built on relationships and relationships are built on trust, thus it is critical to create opportunities and provide the time necessary for participants to get to know each other and build understanding, mutual respect and a sense of team. In some cases, it’s advisable to engage an external facilitator to help potential partners through the group dynamics of collaborating and building consensus on vision and principles, as well as tasks and timelines. This can be critical when there is a power differential among partners due to size, experience, capacity or assets.

Attention to relationships and trust must continue throughout the collaboration, and strong communication and feedback processes built into the partnership structure. Collaborations are

most often initiated and sustained by personal connections, and can be jeopardized when those relationships are no longer part of the partnership. Paying particular attention to such situations can be critical to the success and survival of the alliance.

Flexibility – Because most collaborations are new initiatives for the partners involved, and because there are often so many variables, it can be difficult to fully anticipate how the partnership and program will develop. For more complex work, it is important to recognize that there may be considerable trial and error, and so an iterative approach to planning can be helpful, as well as building in regular opportunities to review and assess progress and make adjustments accordingly.

Without deliberate and thoughtful attention to these elements, partnerships can quickly go sideways and require considerable efforts and resources to salvage, if they can be rescued at all. This was demonstrated in some of the recent community foundation collaborations, and underscores the importance of not only good preparation and planning, but also the need for incorporating such activities and strategies as board engagement, developmental evaluation, team building, risk management, contingency plans, and exit options into the process.

These conclusions are also consistent with findings in other studies of non-profit partnerships, and can help form principles for considering, planning and implementing alliances.

Steps to Successful Collaborations

The elements outlined above should be incorporated into a progression of steps addressing both process and content of the collaboration. These include:

1. **Group Development:** building relationships and trust; identifying motivations, opportunities and obstacles
2. **Project development:** surfacing values, principles, risks, minimum specifications for partnership/project participation; gathering and analyzing information
3. **Selecting a structure:** identifying specific tasks, accountabilities, schedules, role descriptions, decision-making processes, resources
4. **Documenting decisions and delivery:** developing agreements, governance, communications systems (internal and external), mechanisms for conflict resolution, feedback loops; legal issues
5. **Implementation:** application of decisions, and/or phasing-in of activities, workplans, schedules
6. **On-going learning, evaluation, review:** maintenance and adjustment of partnership according to learning what works well, what needs improvement, new opportunities, changes in environment

Tools and Resources for Successful Collaboration

A variety of tools and resources can be used or adapted to address these elements and steps in community foundation collaborations; some are part of publications included in the attached Reference and Resource list, and some have been developed specifically for some of the partnerships outlined in this paper. In addition, copies of relevant checklists, surveys, agreements, position descriptions, policies, etc. are available and can be used as templates or to inform discussion and decision-making.

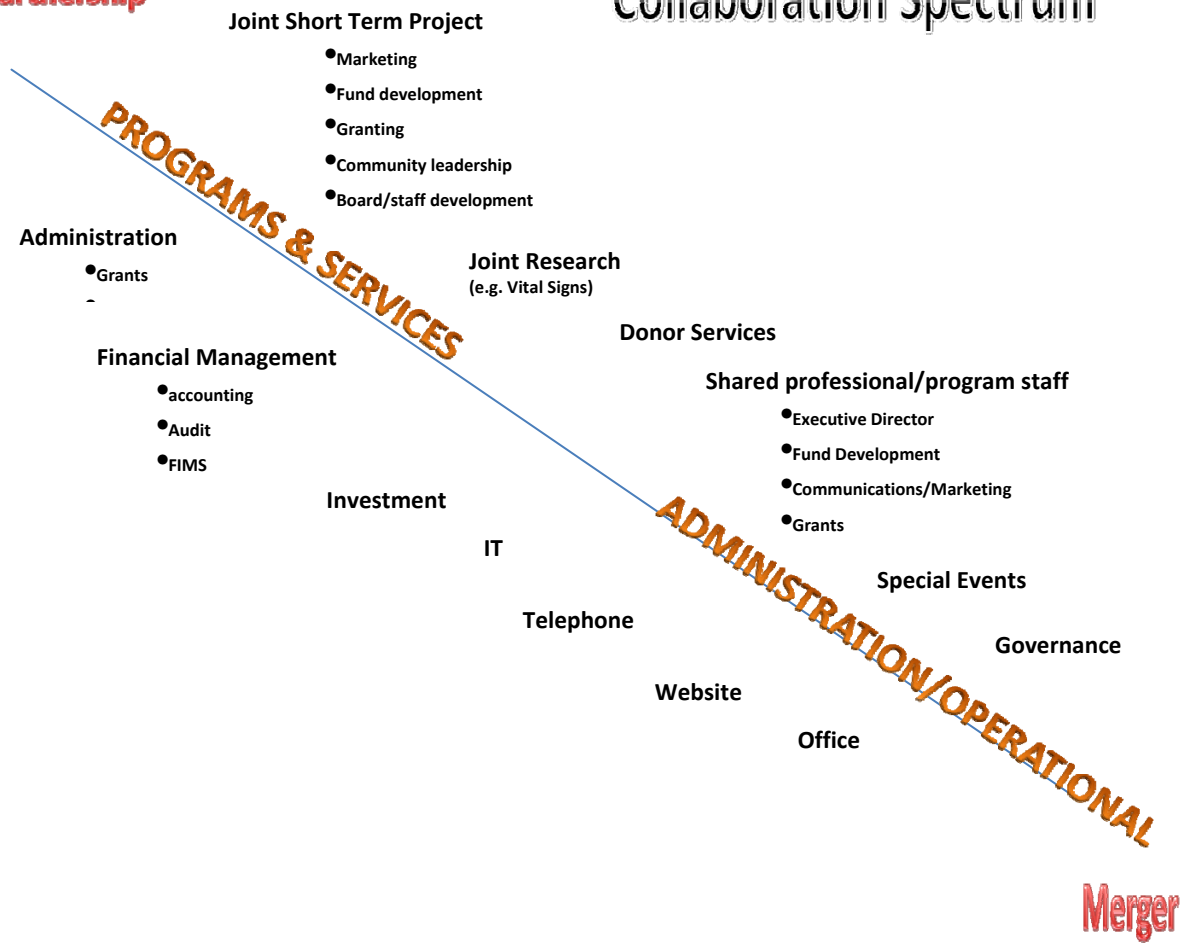
For example, the **Collaboration Spectrum**, below, was developed to assist the Simcoe County Community Foundation Hub Project in thinking through the areas of greatest potential for shared administration and possible joint programs. It has since been used in at least two other instances of collaboration exploration and is relevant to all three of the types of partnerships described in this paper. By having meeting participants place coloured dots on the areas where they believe their foundation *must*, *probably should*, *possibly could*, and *would not* collaborate, a picture of areas of greatest consensus is quickly developed, which can form the basis for more focused discussion. Having participants undertake the same exercise, but from different perspectives, such as that of a staff member, board member, donor, citizen, or other community partners or stakeholders, can help broaden their thinking, allow for a deeper discussion, and surface hidden concerns *and* possibilities.

Other tools and templates address motivation, readiness, principles, and minimum specifications for collaboration, and there are also resources for more concrete tasks, such as developing management agreements, role descriptions, terms of reference, evaluation, etc.

In short, there is now considerable technical assistance available for community foundations' partnership development. However, that will not be enough to support the scope and scale of collaboration that is possible, and, some might argue, desirable to optimize the impact and sustainability of community foundations. What is also required is nurturing a supportive environment, identifying realistic resources, and cultivating awareness, attitudes and leadership for partnerships to develop and flourish.

No Partnership

Collaboration Spectrum



Moving Forward:

Community Foundations of Canada can play a key role in creating the awareness, leadership, knowledge, skills, resources and supportive environment necessary for community foundation partnerships to develop and thrive. But in addition to fostering collaboration, it will be essential to consider the implications of collaborative efforts on CFC as an organization and on the movement overall. For example, while CFC is encouraging the creation of community funds as a viable option to launching new independent community foundations, what are the implications for serving those entities? Should the community fund access CFC programs and resources directly, or through the “parent” foundation? What would happen if a community foundation didn’t provide the necessary support to ensure that a community fund was fulfilling its local roles of grantmaking, fund development and leadership in a way that is consistent with CFC’s *Principles for Community Foundations*? If a collaboration reveals that a partnering foundation is deficient in a critical area, what should the response be, particularly if it relates to CFC’s membership criteria? What are the risks involved if one or more community foundations outsource their administration and financial management to another foundation?

It will also be important for CFC to find the appropriate balance between leading or instigating strategic alliances, promoting collaborative ideas or opportunities, and supporting those that emerge from the membership. In some cases, CFC’s role may be best served as model, mentor, or coach; at other times, as facilitator or even mediator. Because of CFC’s position at the centre of the community foundation network, it is in a strategic position to identify trends, issues, opportunities and capacities, and to make connections among community foundations where there is promising potential for strategic alliances. At the same time, context, timing, relationships and resources are all variables that must be factored into the decision of what opportunities could and should be acted on. But there is much that CFC can do to help to equalize these variables and nurture collaborative cultures, capacities, and environments among its members. By thoughtful and intentional cultivation and application of the elements, steps and tools for successful collaboration that were earlier articulated, and by continuing our learning and identification of promising practices, CFC will not just be a thought leader on the topic of community foundation alliances, but an invaluable collaboration resource, partner, catalyst and practitioner.

In addition to the work that CFC is already doing to promote opportunities for foundations to work together, a number of focused activities could be undertaken to encourage, support and enhance strategic alliances. These include:

- Creating CF-LINKS workshops and webinars, on both strategic alliances in general, as well as program specific collaboration processes, and developing Tips and Tools on community foundation regional collaborations and strategic alliances, community fund agreement and policy templates. Also, providing information and skill development on working in partnerships within the context of a program that a foundation participates in provides “just-in-time” and experiential learning that is more efficient and effective.
- Developing a comprehensive dissemination strategy, making research, tools and resources available to community foundations through the CFC website, regional meetings, conferences and on-sites. This could also include conference presentations, articles and other opportunities to inform and encourage other partners and stakeholders to engage in or support collaboration, such as Philanthropic Foundations Canada, Imagine Canada, United Way, etc.
- Providing Regional Coordinators with training on collaboration processes, and opportunities to use their role and relationships to help foster partnerships. On-site planning sessions with foundations provide an ideal opportunity to introduce and generate discussion about specific interests and opportunities for partnering. In addition, the role of the Regional Coordinator enables seeing the 'big picture' as well as what is happening in local communities, and the concerns, challenges and capacities of individual community foundations. This allows for more

recognition of opportunities and connecting foundations with each other on specific topics that each has identified as an issue or interest.

- Further integrating collaboration into other programs; for example, the Community Foundations and the Environment Program includes a component for Kick-Start grants for regional community foundation partnerships. This approach could also be used in other CFC programs such as Youth in Philanthropy and Vital Signs, and, depending on available capacity and resources, could be as simple as encouraging partnerships and making tools available, to more formal projects that require financial and/or staff support.
- More intentional documentation and assessment of collaboration processes in CFC program partnership evaluations, as well as identifying and acting on opportunities to collect information and learnings from CFC members engaged in partnerships with each other. In addition to adding to the promising practices already identified, this could provide new tools and templates for use by other community foundation collaborations. CFC could also connect for focused exchanges with other support organizations interested in promoting collaboration, such as the Council on Foundations, the Aspen Institute, the Trillium Foundation, the Columbia Basin Trust, the Lodestar Foundation and others.
- Offering an on-line “dating service” for community foundations interested in exploring potential partnerships.

These ideas and options would largely fit within CFC’s existing programs and structure, although some would require a considerable investment of staff time. However, they are consistent with our interests, as noted earlier, in *promoting learning relationships between community foundations; fostering strategic use of networks, partnerships and programs; and supporting activities to help community foundations thrive in a changing and challenging environment.*

It may also be worthwhile to elicit feedback from member foundations regarding what they would find helpful to strengthen their capacity to collaborate with each other. In any event, developing a comprehensive framework to support community foundations to deepen their impact and increase their sustainability through strategic alliances is a powerful and timely opportunity for Community Foundations of Canada to advance our knowledge, leadership and impact in an area of increasing importance throughout the community foundation movement and the philanthropic and nonprofit sectors.

As our website notes, “a network of our size can do incredible things!”

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