# The Secret to Securing Collaboration Resources

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## Raise Funds More Easily and Attract the Partners You Want

By Kimberley Jutze

**Global health pandemics, economic inequality, and climate change are among the most daunting challenges of our time.** Addressing the underlying causes of these, and other big, complex problems, involves bringing people together across industries and sectors to come up with solutions that benefit everyone. Multi-sector, multi-stakeholder collaboration requires a common focus and commitment as well as resources. Without funding and committed partners collaboration grinds to a halt. However, securing the resources that collaborative groups, like networks alliances, and coalitions, need is often harder than it seems.

**A significant obstacle to obtaining funding is convincing funders to support collaborative efforts.** Funders are inundated with funding requests for immediate needs, so it can be difficult to focus their attention on longer-term solutions. Once you have their attention, making a compelling case for how their investment will change society for the better is critical. Funders may also need to be convinced of the benefits of a coordinated approach to funding. Joining a funder collaborative enables funders to pool their money so that more funding can be made available to solve social problems on a larger scale.

**It's one thing to make the case for investing in a sustainable solution, like ending chronic homelessness; it's another to secure a long-term financial commitment** for changing systems that are keeping big, complex problems stuck. This is a tall order when donors prefer to make shorter-term commitments that alleviate immediate suffering and produce results that can be easily measured. It's an even taller order when funders lack incentives to coordinate with each other.

**Partners are another essential resource for collaboration that can be challenging to develop and grow.** For example, people with lived experience of the problem the group is working to solve tend to be under-represented in networks. Reasons for this can include:
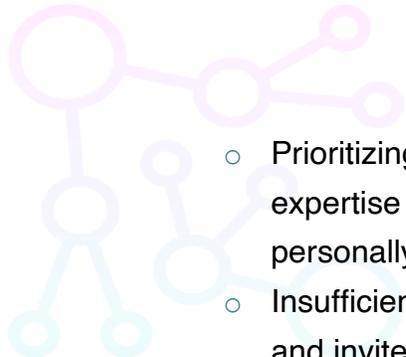
- Prioritizing the recruitment of content experts (people who have technical expertise for solving social problems) over context experts (people who personally experience social problems).
- Insufficient outreach to diverse communities to inform people about the network and invite them to join.
- Financial burdens that prevent people from volunteering.
- Lack of coaching and training to prepare people to fully participate in the network.

**Difficulties securing resources for collaboration are not limited to enlisting the ongoing support of committed funders and partners.** There are other resource development problems that have the potential to destroy partnerships.

**How familiar are these predicaments to you?**

1. **Seeing fundraising as a zero-sum game in which more money for the network means less money for your own organization and vice versa.** A scarcity mindset is common in a philanthropic environment that requires nonprofits to continuously compete for funding. Funders send a message that competition is more important than cooperation when they use funding processes that reward the best applicant, instead of a group of applicants. Tying funding to results disincentivizes collaboration when nonprofits are expected to demonstrate what they achieved instead of enabling everyone to take credit for collective results. Funders who don't coordinate their grantmaking or participate in funding collaboratives communicate through their actions that cooperation isn't valued. It is not surprising then when conflicts occur over money, power, and credit for success that distract network members from the mission making it harder to achieve collective goals.

2. **The most affluent members direct the work of the network.** It is easier to access funding when a funder is a member of the network, but this can result in them having too much of a say in what and how work gets done. When the expectations that go along with a financial contribution have not been clearly communicated and mutually agreed upon this can erode teamwork. One example is when funders relate to other network members as sub-contractors instead of as equal partners. Informed decision making suffers when funders' ideas are given more importance and credibility. When the funders' participation in the network is not clearly defined early on in a way that improves collaboration this can lead to unhealthy conflict, a

disengaged membership, and turnover among members who are no longer motivated to participate.

3.  **Disagreements about how funding is allocated and used.** Funding becomes a source of unhealthy conflict when people are unable to agree on the group's priorities. Factions can emerge among members who have competing views about whether the network should invest resources in programs or increasing capacity. Both are important for achieving collective goals, but that doesn't necessarily mean that they are equally important all of the time or that funding should be evenly split between programs and operations. Engaging in vigorous debate for the purpose of evaluating ideas is essential to informed decision making. However, when debate is not managed well, it can lead to unhealthy conflict in the form of interpersonal politics and personal attacks that cause collaborative efforts to unravel.

**If these predicaments are familiar to you, the challenge your group is really facing is not lack of funding; it is lack of trust.** Without trust, fundraising and partnership development are unlikely to succeed. This is because accomplishing anything of significance together requires the belief that people will follow through on their commitments. Also fundamental to trust is a willingness to be vulnerable with each other. Communicating openly and honestly can only happen when people believe that their partners' intentions are good and that their words and actions will not be used against them. Just as fundraising is really about developing meaningful—instead of transactional—relationships with donors, the same is also true for networks.

**Conflicts involving money, power, and credit for success are especially difficult to resolve because they involve egos.** The urgency to get work done to sustain the momentum of collaboration makes it difficult to take the time to examine what is causing disharmony within the group. A tendency to avoid uncomfortable situations, as well as not taking into account how our own needs and concerns are contributing to this situation, decrease the likelihood of resolving problems early on. Like dust bunnies under the carpet, unresolved tension and conflict continues to grow over time until it can no longer be ignored.

**The good news is that your group can secure resources, solve problems getting in the way of this effort, and create positive outcomes for the people you serve.** In this article, I provide a resource development process that makes it easier to raise

funds and develop partnerships. In addition to explaining how this process works, I also provide tips that you can immediately use to increase engagement, productivity, and build mutually satisfying relationships with the people you are working with.

## The 4Ps of Collaborative Resource Development

**There is more to resource development than fundraising expertise.** In other words, how resource development gets done matters as much as what gets done. The 4Ps of Collaborative Resource Development is a process that makes fundraising and partnership development easier because it takes into account the task and relationship dimensions of collaboration. This systems approach to resource development consists of four key components that are aligned and mutually supporting, which are: Plan, People, Processes, and Partnership Spirit.

Partnership
Spirit

Processes        Plan

People
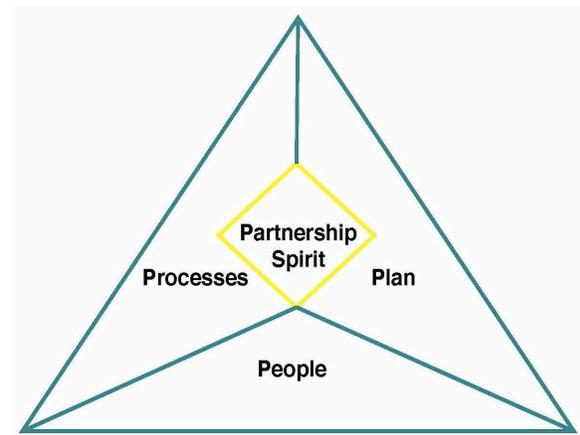
### PLAN: Strategically grow and diversify sources of funding and partners

**Resource development begins with setting clear goals and having a plan for reaching them.** A resource development strategy can help your group obtain new funders as well as respond to changes in your operating environment, like an economic downturn. As part of your plan you will want to consider strategies for growing an existing source of funding or accessing new sources, such as membership dues, grants, sponsorships, events, and/or selling products and services.

**Creatively linking and leveraging fundraising assets can help your group strategically grow and diversify its funding.** Assets, which are resources that are voluntarily contributed to fundraising efforts, can be physical (e.g., event space), knowledge or skill-based (e.g., grant writing), or social (e.g., donor relationships). Work with your group to identify fundraising assets that members are willing to contribute to fundraising. Once you have an asset list, the next step is to come up with creative ideas for deploying them separately or combining them with other assets to obtain funding. For example, an association for socially and environmentally responsible businesses I am a member of decided to host a holiday gift bazaar. By creatively using its social assets the association was positioned to simultaneously raise funds for its work,
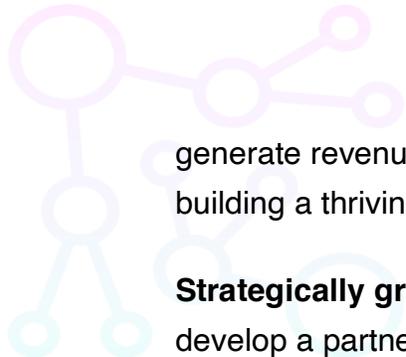
generate revenue for participating member businesses, and advance its mission of building a thriving movement of businesses as a force for good.

**Strategically grow and diversify the network's membership.** One way to do this is to develop a partnership development matrix. This can be as simple as creating a spreadsheet that lists the ideal characteristics of a network member, like skills, experience, demographics, personality traits, organization type, location, and access to specific resources. After individual members have completed the matrix, review the results as a group to determine gaps that can be filled. New members can then be recruited that possess desired characteristics that are under-represented in the network.

## PEOPLE: Recruit new members and enlist participation in resource development

**Be intentional about inviting new members to join the network.** Some criteria to consider for membership recruitment are people who have: a strong connection to the work the network is doing, a willingness to actively participate, skills and access to resources the network needs, and a team player attitude. Setting membership criteria and expectations for participation in the network early on can help address power dynamics, such as an agreement that funders participate as non-voting members.

**Resource development is not a one-person job; everyone needs to pitch in.** Once a resource development strategy is in place, there needs to be a primary point of contact to lead the execution of this plan. Fundraising and partnership development are essential activities that involve considerable effort, so all network members have a responsibility to help out, even if they are not serving on a resource development committee. This does not mean that everyone needs to spend all of their time asking for money. There are meaningful ways for network members to participate, like making an introduction to a potential funder or writing a thank you note for a donation. One way to increase members' participation in resource development is to match their skills, interests, and availability to take on fundraising and partnership development tasks.

**Set an intention that diversity and inclusion is essential to successful resource development.** Create opportunities for context experts to actively participate in and lead resource development activities. This begins with being pro-active in engaging marginalized people in resource development. For example, go to communities that are directly impacted by the problem the network is working to solve instead of waiting for people to come to you. Get to know context experts and invite them to participate in the

network. Instead of expecting people to figure out how to overcome barriers to participation on their own, like language, skills, transportation, childcare, and limited availability, work together to come up with solutions that meet everyone's needs.

**Make it easier for context experts to participate in resource development by:**

- o   Extending a personal invitation to participate in resource development activities.
- o   Finding out what special gifts and talents people have that can be put to use.
- o   Scheduling resource development meetings during times that are convenient.
- o   Providing coaching and training to help people get up to speed.
- o   Checking-in with people periodically to see how they are getting on.
- o   Offering an honorarium to ease the financial burden of volunteering.

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**Case Study:** An alliance that collaborates with local businesses, social enterprises, and consumers to develop an inclusive, regional economy turned to Shifting Patterns Consulting for support for establishing an advisory board. In partnership with the alliance's leadership team I helped clarify the purpose of the advisory board, determine membership criteria, and communicate expectations to potential members. I facilitated a meeting that enabled the leadership team to meet potential advisory board members and experience what it would be like to work together. I also facilitated a debriefing meeting for the alliance's leadership team that included determining next steps for establishing an advisory board. The alliance now has a diverse group of community leaders it can turn to for input and expert guidance on developing a regional economy that works for everyone.

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## PROCESSES: Facilitate and coordinate resource development activities

**Involve network members in setting clear expectations for working together.**
When groups form there is a tendency to dive into the work that needs to get done. Although it is important to generate momentum to maintain participation in the network, misunderstandings and upsets resulting from behavior that does not match our expectations not only slows down collaborative efforts, but can also bring them to a halt.

**Setting expectations can be as simple as working together to create a written agreement** about how: decisions will be made, problems will be solved, members will hold each other accountable for following through on commitments, and progress will be
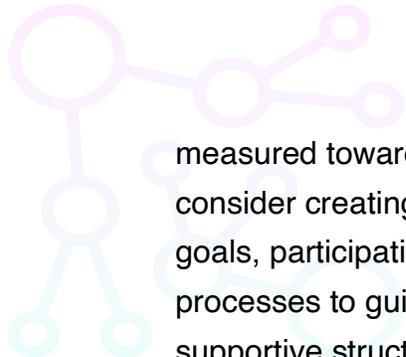
measured towards achieving resource development goals. You may also want to consider creating a charter or operating guidelines that includes resource development goals, participation, how often people will meet, etc. In addition to developing work processes to guide resource development activities, it is also important to establish a supportive structure for the group, like a committee, working group, or task force.

**Lack of trust not only makes fundraising and partnership development harder; it makes all kinds of collaboration harder.** When trust is developed and maintained, network members can focus on getting work done instead of being distracted by tension and unhealthy conflict. Trust building is not a one-time event. It is an ongoing effort that involves making the time for network members to get to know each other and establish ways of working together that are healthy and productive.

Some ways groups can build trust as part of collaborative resource development are:

- o **Create shared experiences** in which members get to know each other better and form a bond. Integrate social activities into resource development tasks, like having a meal together, doing a field visit, or participating in icebreakers.

- o **Demonstrate vulnerability by leading by example.** If you are a network leader, go first in sharing what is going on. For example, disclose personal situations that are affecting your participation in the group or ask for help.

- o **Provide the space for open and honest conversations about resource development.** Recognize when there may be tension within the group. Acknowledge this situation and invite people to share their concerns as well as what is behind them. Come up with solutions that work for everyone.

- o **Start off by making small, short-term commitments.** If your network is newly formed, make it easy for people to work together. For example, involve network members in organizing a modest, brief campaign that serves as a learning experiment for raising funds and building a track record of working together.
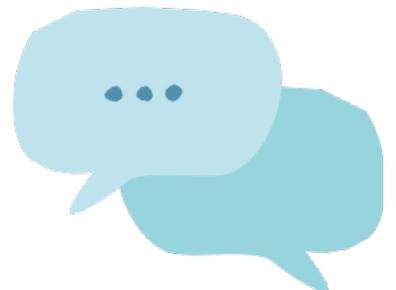
**An orchestrator is critical for keeping resource development activities on track and moving forward.** This position, whether it is filled by paid staff or volunteers, helps
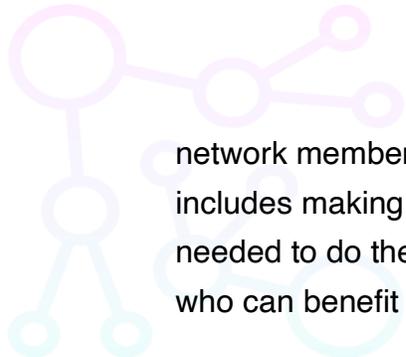
network members get organized and focus on the work to be done. Orchestration includes making sure that everyone has access to information and other resources needed to do their work, coordinating resource development tasks, connecting people who can benefit from being in contact with each other, and facilitating meetings.

> **Case Study:** A regional association for socially and environmentally responsible businesses increased its productivity with support from Shifting Patterns Consulting. I helped the association's leadership team develop a strategy and participated in the development of an operations manual and committees to guide its work. I also facilitated governance committee meetings to set strategic goals and review progress in implementing the association's action plans. As collaborative capacity is developed, more attention is being given to assessing the leadership team's performance, which includes reviewing the accomplishment of tasks and how well members are working together. Since the association was established, it is better organized and has made significant strides in increasing its membership and visibility.

## PARTNERSHIP SPIRIT: Create a resource development culture

**Culture is the most critical element of the 4Ps because it significantly influences resource development results.** "Culture eats strategy for breakfast" is often attributed to Peter Drucker. This quote is based on the idea that culture, which encompasses a group's identity, unspoken rules about how people work together, and beliefs about the network, affects what and how work gets done as well as results achieved. Despite the importance of culture, there is a tendency for leaders to focus on strategy, staffing, and work processes because these elements are more visible and are easier to change.

**Developing a resource development culture involves developing norms** (explicit or implicit rules about how things are done) that support the group in achieving its desired results. This involves working together to identify existing norms and changing ones that prevent network members from accomplishing collective resource development goals. It is also important to make sure that everyone agrees to the new norms and commits to using them. Some examples of norms that are supportive of a resource development culture are: viewing funding as integral to the work of the collaboration, resource development tasks are collectively owned by the group, and committing to act in the best interests of the network.

**One of the most powerful aspects of culture, and perhaps the most difficult for us to change, is our mindsets.** This is about recognizing when we're stuck in a pattern that is no longer serving us and making a different choice.

**Transitioning from a scarcity to an abundance mindset requires optimism, creativity, and a willingness to explore new ways of working together.** This means that we can choose to engage in collaborative fundraising by finding ways to expand the pie (yes, and) instead of focusing on getting a bigger slice (either, or). For example, instead of asking funders to choose between funding the network or a member, invite funders to consider funding the collaboration and its members. Network leaders have an important role to play in challenging how members' think about and participate in fundraising as well as creating a supportive environment for change.

**Embracing diversity and inclusion requires a mindset in which differences are a source of learning and innovation instead of determining who wins and loses.** According to Organizational Psychologist, Dr. Michael F. Broom: "There are no problems within human systems [any group of people trying to get something done together] that don't stem from dealing ineffectively with differences." A recognized best practice in collaboration is genuinely engaging people who are directly impacted by the problem the group is working to solve as full partners in this process instead of as passive recipients of goods and services. This means changing how we see and work with context experts. One example is according the same level of respect for indigenous practices as scientific methods.

## Collaborative Resource Development Key Takeaways

**A resource development system involves more than assembling the individual parts; the parts also need to work well together.** If your network already has a resource development plan, along with the people and processes to execute it, the next step is to ensure that all of these elements are aligned and mutually supportive. For example, fundraising will continue to be a struggle as long as collaboration members do not see it as a priority or as someone else's job. Even if the network makes resource development a priority, fundraising and partnership development efforts are less likely to be successful if members do not trust each other and are unwilling to hold each other accountable for following through on commitments.

**Aligning the 4Ps of Resource Development requires systems thinking.** This involves thinking more broadly about resource development to encompass multiple dimensions of fundraising and partnerships. It also involves taking into account how resource development strategies, people, processes, and culture influence each other and work together. For example, strategies are effective when the right people are committed to carrying them out. People are more productive when they know what needs to get done, they have the skills and experience to accomplish their tasks, and their efforts are supported. A culture that values cooperation and views funding as essential to collaboration makes resource development easier.

**As you consider how to take these ideas forward, keep these key points in mind:**

1. It is not enough to bring collaboration members together and expect that funding and partnerships will follow—people also need support to work well together.

2. Creating positive change, whether it is raising funds or the impact that is made possible by funding, ultimately depends on the quality of our relationships. In other words, interpersonal skills are just as important as fundraising skills.

## About Kimberley Jutze and Shifting Patterns Consulting

**Since 2012 I have been helping people work better together to more easily obtain resources that make social impact possible.** Prior to starting my consulting practice, I helped nonprofits raise over $50 million in total funding from institutional and individual funders. As a consultant and experienced organization development practitioner, I partner with networks working in the United States and around the world to develop strategies and processes, as well as collaborative relationships, that contribute to increased productivity and better results for people served.

**Shifting Patterns helps networks, alliances, and coalitions that are creating positive change increase their engagement and productivity.** Whether your network is just getting started or is growing, our services are customized to address your specific needs. With our skills-building workshops you will learn the fundamentals of collaborative resource development. Our strategic planning, resource development,
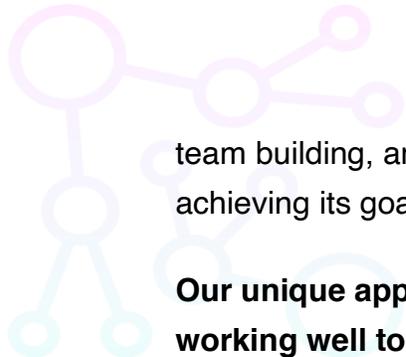
team building, and meeting facilitation consulting services support your network in achieving its goals.

**Our unique approach helps networks solve problems that prevent people from working well together** by combining network building, fundraising, meeting facilitation, and organizational and human systems processes. We work alongside network members to pinpoint the underlying causes of disengagement and poor performance, support clients in coming up with their own solutions, and put a support system in place to maintain improved performance.

Results we've achieved for our clients include:
o Supporting the sustainable growth of a national social services network.
o Guiding a design team in developing a community-based alliance for sustainable, regional economic development.
o Strategizing the recruitment and onboarding of key stakeholders to an environmental policy coalition.

*"Kimberley not only thinks organizational dynamics through, she is also exceedingly quick on her feet in meetings – able to redirect and get discussions back on track and/or change directions as circumstances require. With Shifting Patterns' able organization development support and facilitation, we now have an active design team and a deep back bench of advisors and supporters." – Jim Schulman, Executive Director, Alliance for Regional Cooperation*

To learn more about our services and the positive results we've helped create for networks, alliances, and associations **visit us online at: www.shifting-patterns.com.**

## Take the Next Step to Raise Funds and Develop Partnerships

To schedule a free 60-minute consultation to discuss your situation and learn more about how we can help, visit: **https://shifting-patterns.com/contact**.



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