



## Collaboration Best Practices

Tapping into collective resources to achieve mutual success

Sara Meaney  
Principal | Coraggio Group

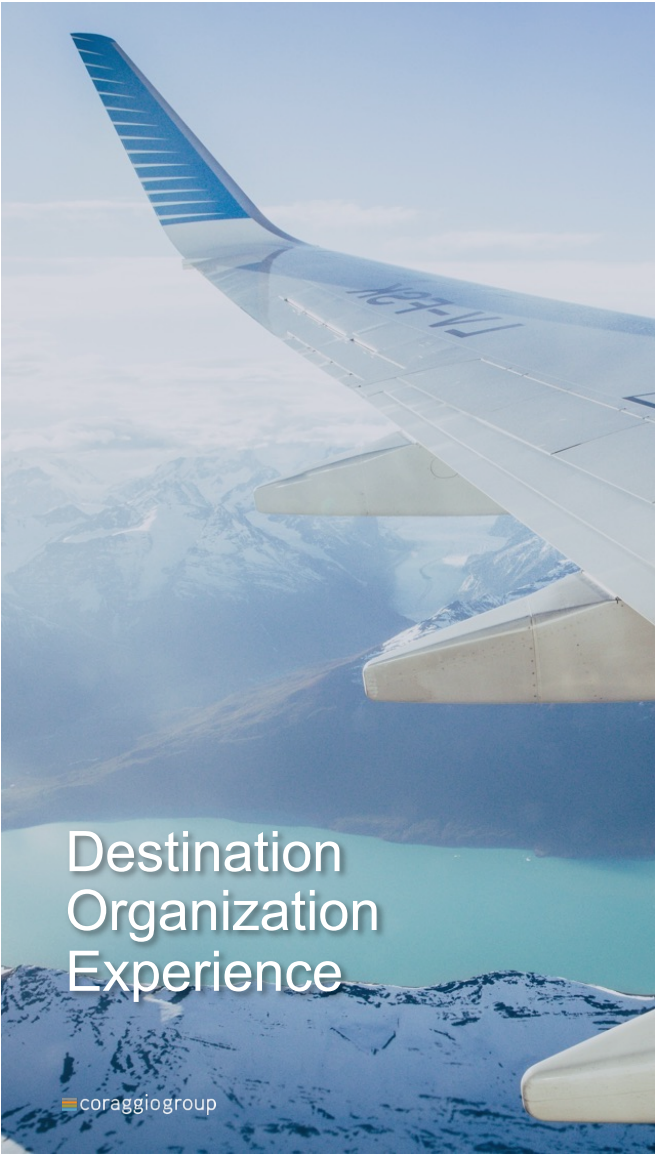






## What we'll touch on today:

1. A couple case studies
2. What the research says about collaboration
3. Collective Impact framework
4. Putting it into practice



# Destination Organization Experience

coraggiogroup





# A couple case studies

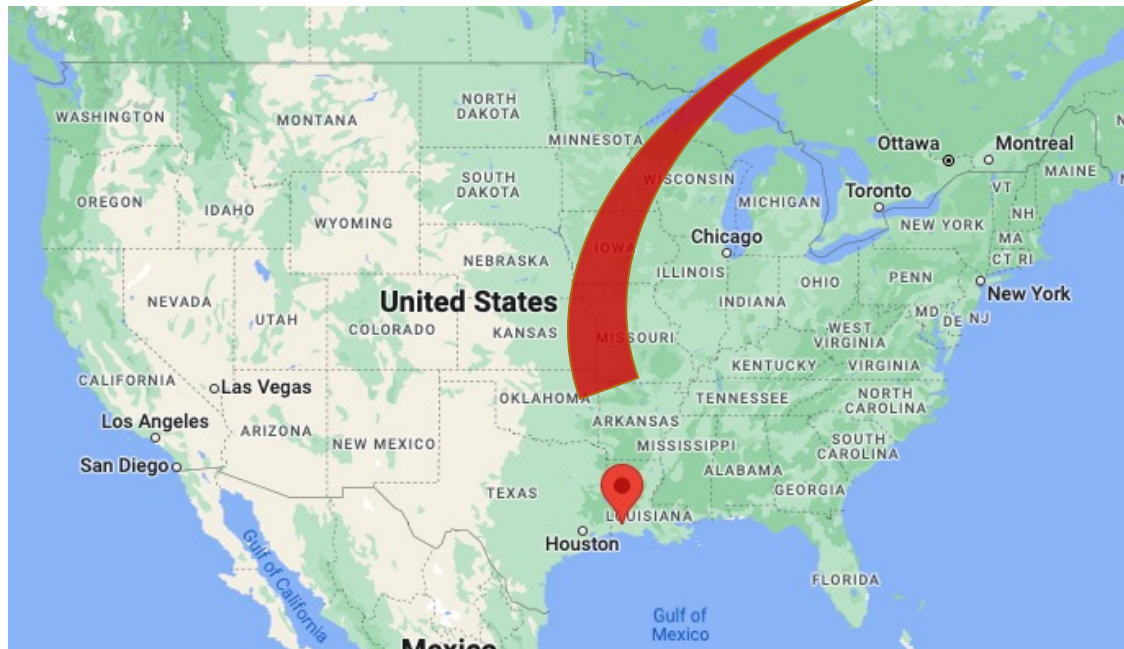




1



## Case Study: Just Imagine SWLA



Lake Charles, Louisiana



## Case Study: Just Imagine SWLA

### The Situation:

- Back-to-back hurricanes (Laura & Delta) in 2020-2021
- Widespread devastation and flooding
- Urgent need; assistance and relief slow to arrive

### The Opportunity:

1. Coordinated efforts to secure emergency relief and funding
2. Rebuild communities and build resiliency

### The Partners:

- City of Lake Charles
- Community Foundation of SWLA
- Visit Lake Charles
- Calcasieu Parish Police Jury
- SWLA Economic Development Alliance
- United Way of Southwest Louisiana
- City of Sulphur
- Cameron Parish



## The Outcomes

1. FEMA funding secured a year later, in October 2021
2. 50-year resilience master plan for the region is underway, testing 10 catalytic projects that focus on:





*“The Foundation is committed to working collaboratively with leadership and stakeholders in Calcasieu and Cameron parishes to develop a master plan that will help shape our region into a thriving area for generations to come. We are approaching this planning effort with support from experts and with the intent of facilitating an inclusive, transparent, and collaborative process throughout, supported by input from elected officials, stakeholders, and residents. Our long-term master planning process will join with ongoing recovery efforts so that we are all aligned in our mission to rebuild a stronger and more resilient community. ”*

#### ROLES

- Backbone organization
- Secure project funding
- Hire planning firm
- Deliver expertise/resources for catalytic projects

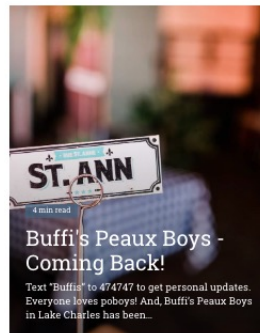
#### GOAL

- Develop a long-term resilience master plan.
- Facilitate inclusivity, transparency and collaboration.

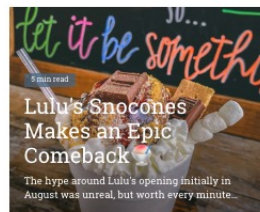




READ MORE →



READ MORE →



READ MORE →

## ROLES

- Communication lead
- Website, ongoing communication
- Support partner outreach efforts

## GOALS

- Rebuild the community
- Support destination development and resiliency
- Advance awareness and engagement





# 10 Catalytic Projects



Project 01  
**COASTAL RISK  
REDUCTION**



Project 02  
**WATERFRONT  
DEVELOPMENT**



Project 03  
**MIXED-INCOME  
HOUSING**



Project 04  
**NELLIE LUTCHER  
DISTRICT**



Project 05  
**MCNEESE  
RESILIENCE  
DISTRICT**



Project 06  
**CHENNAULT  
& SOWELA  
RESILIENCE  
DISTRICT**



Project 07  
**STRONG  
DOWNTOWNS**



Project 08  
**COMMUNITY  
RESILIENCE HUBS**



Project 09  
**RESILIENT  
HOUSING TOOLKIT**



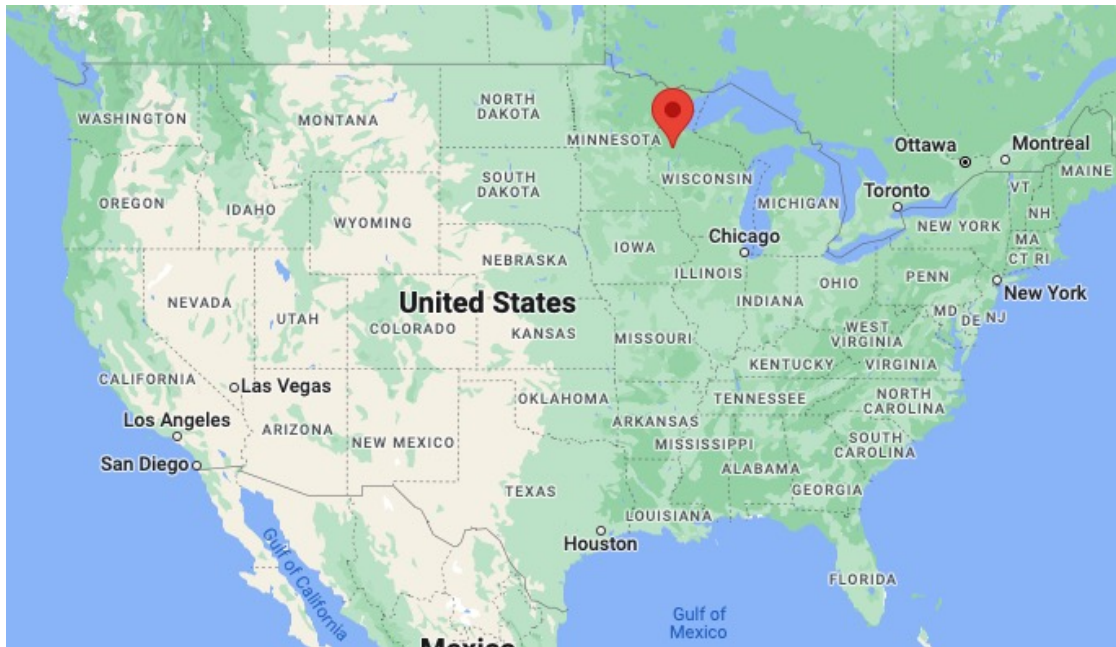
Project 10  
**REDEVELOPMENT  
AUTHORITY**



2



# Case Study: The Hospital Gateway Trails



Hayward, Wisconsin



# Case Study: The Hospital Trails

## The Situation

- Popular global mountain biking destination
- Vast territory to manage and maintain
  - > 1.5 million acres of Chequamegon-Nicolet National Forest
- Reliance on volunteers, limited resources

## The Opportunity:

- Introduce more entry-level access
- Connect existing trails
- Expand adoption of the sport

## The Partners:

- A mountain biking nonprofit
- A local hospital



## The Outcome



*“It is difficult to imagine a better scenario for those who love outdoor recreation. The access to trails right out of work is something that very few organizations can offer their employees. As we continue to grow our healthcare community in northern Wisconsin, attracting excellent clinicians has been critical to our success.”*

Luke Bierl, CEO  
WAMH

#### ROLES

- Collaboration partner
- Owns the property
- Funded a significant portion of the project

#### GOALS

- Advance strategic plan
- Support healthy, active community



**Hayward Area  
Memorial Hospital  
& Water's Edge**

*Right here in the place we love.*



*“The hospital has taken a very proactive approach to promoting healthy outdoor recreation and activities, and this project is an excellent fit with their strategic plan.”*

Ron Bergin, Executive Director  
CAMBA

#### ROLES

- Collaboration backbone organization
- Design and manage the project
- Secure remaining funding

#### GOALS

- Increase entry-level access for community and visitors
- Advance the sport



Other constituents:



Other funding sources:

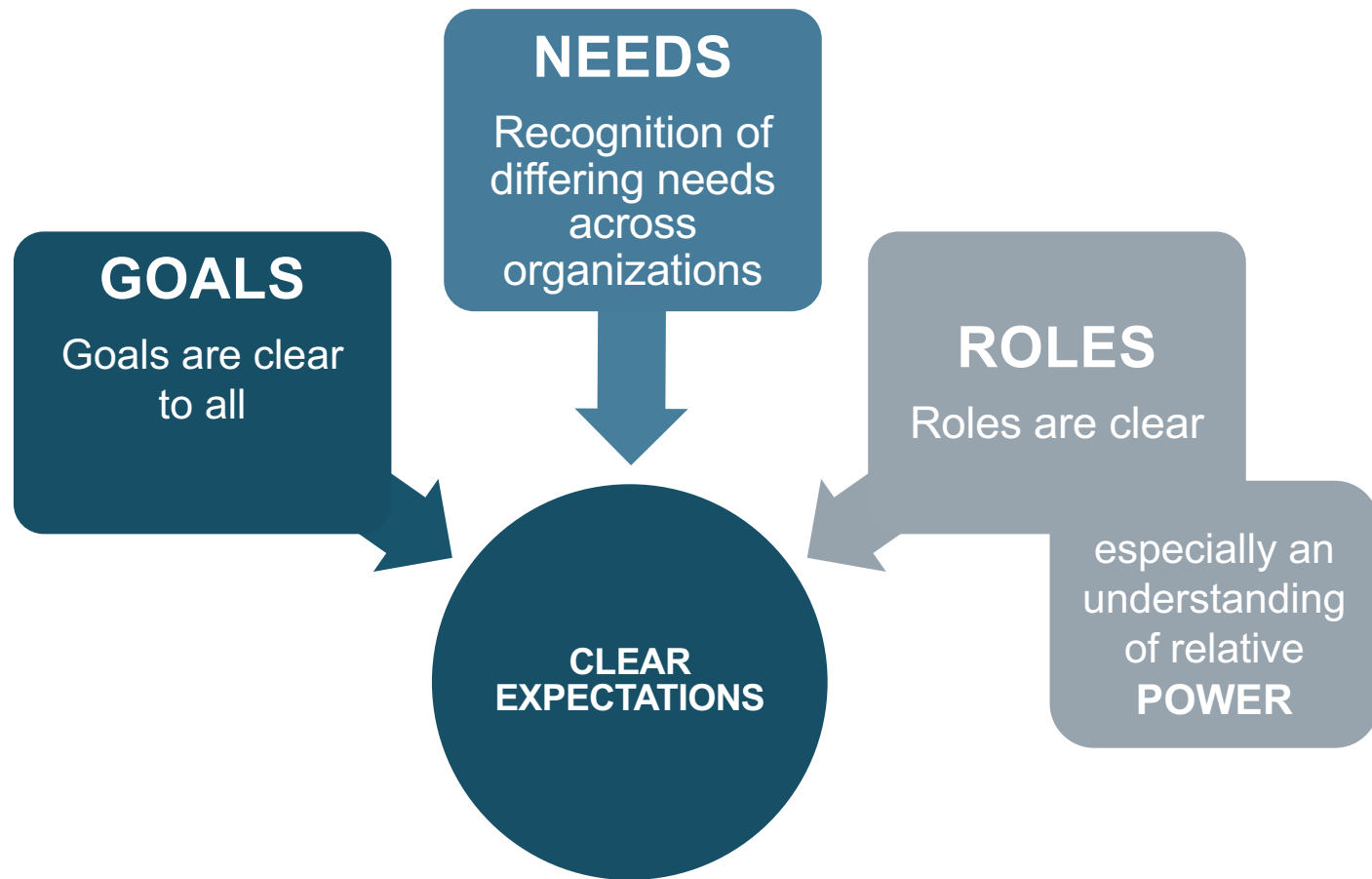


# What the research says about collaboration





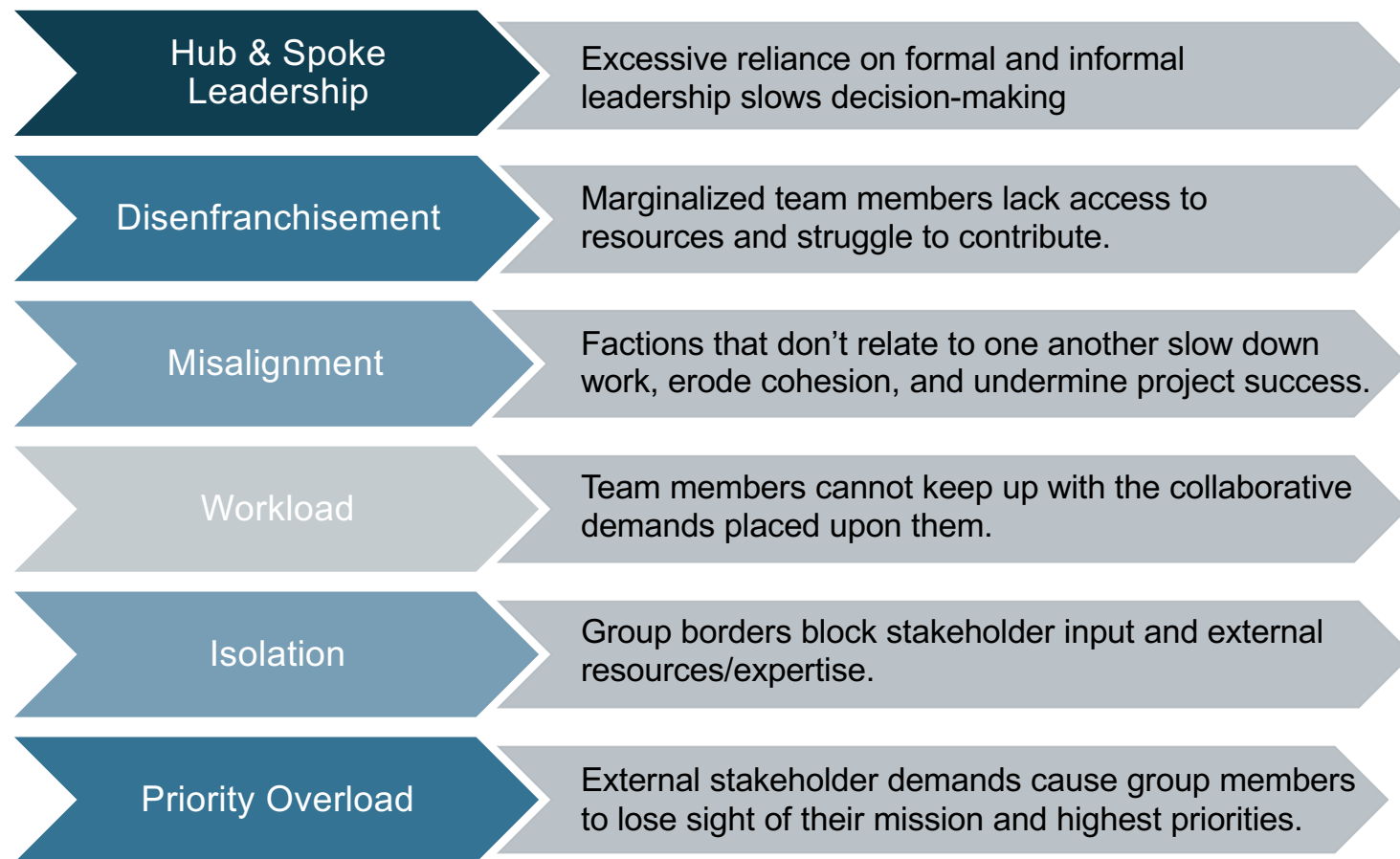
## Hallmarks of successful collaborations



“Power is the secret sauce of collaborations”

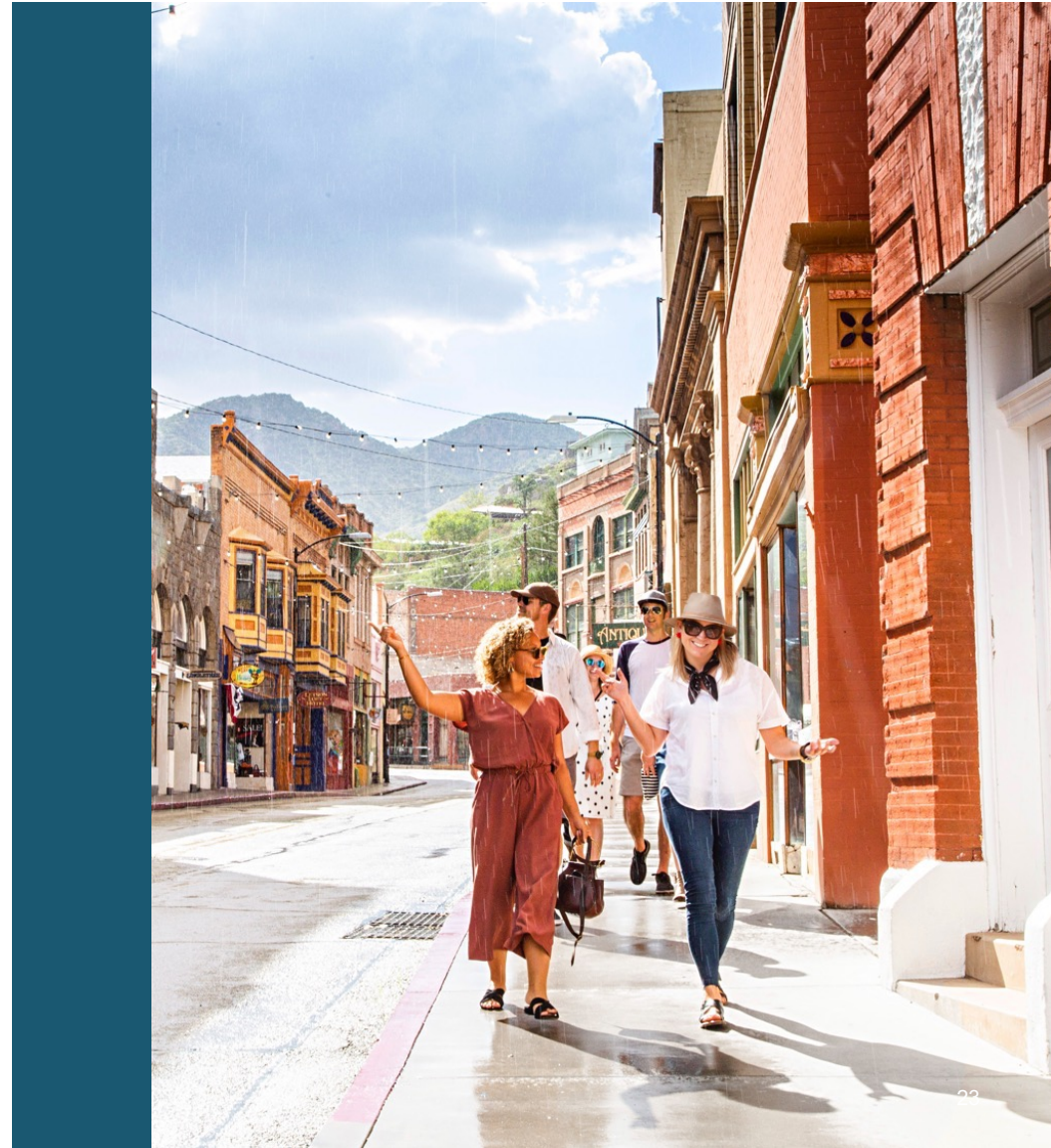
Jon Huggett,  
Stanford Social Innovation Review

## Why collaborations fail

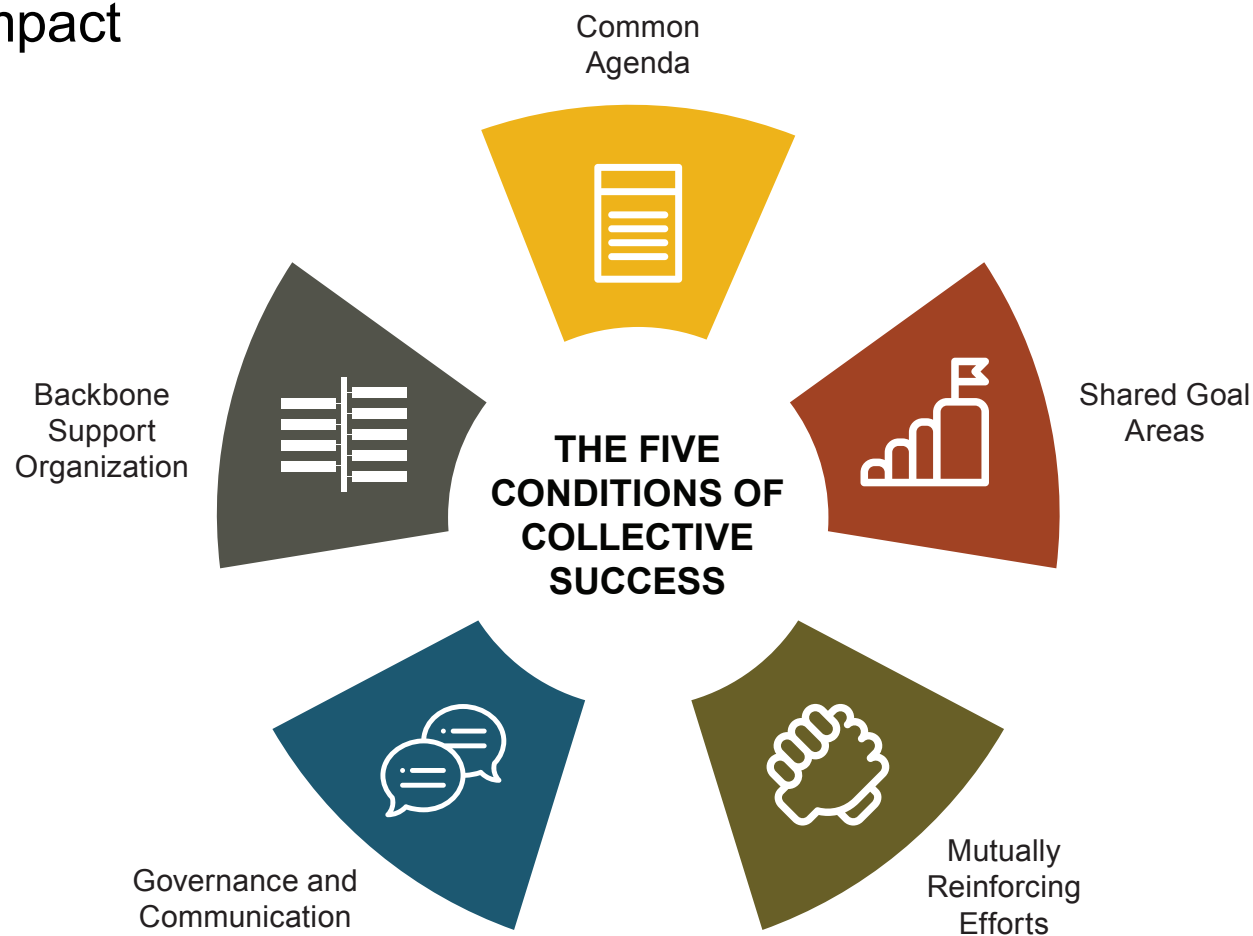




# Collective Impact framework



# Collective Impact



# Successful collaborations have in common...

Centralized  
Infrastructure

Dedicated  
Staff

Structured Process

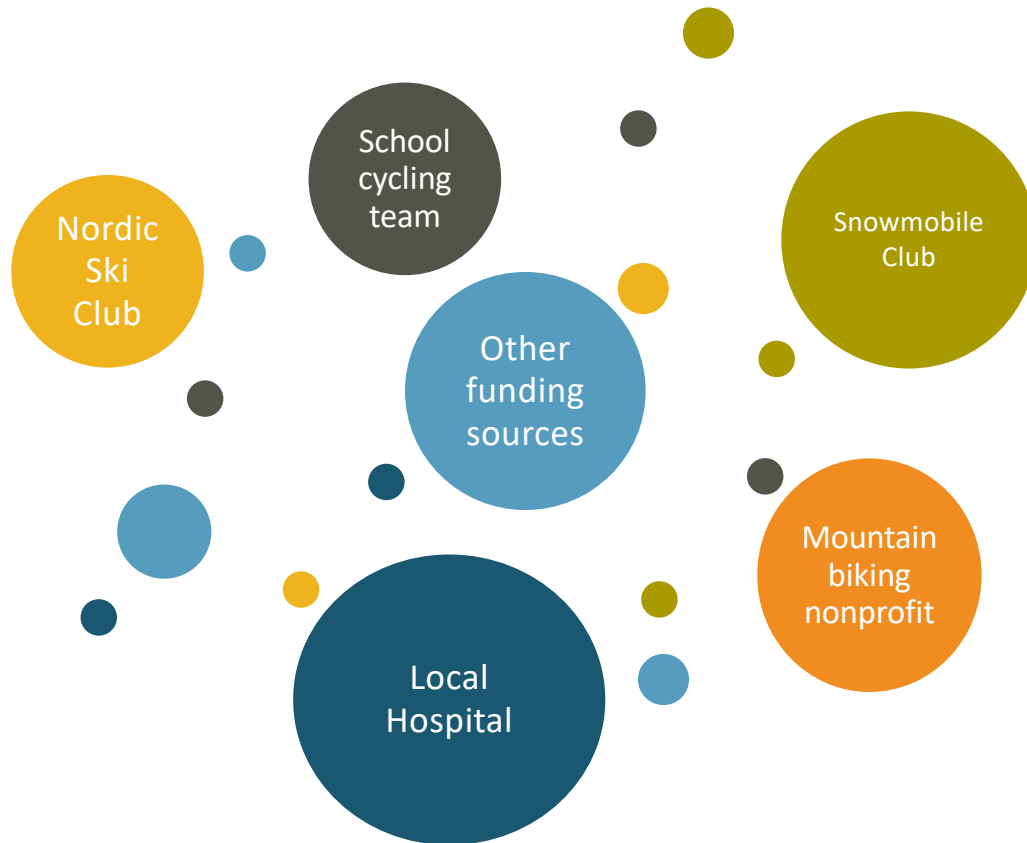
Common  
Agenda

Shared  
Measurement

Continuous  
Communication

Mutually  
Reinforcing  
Activities

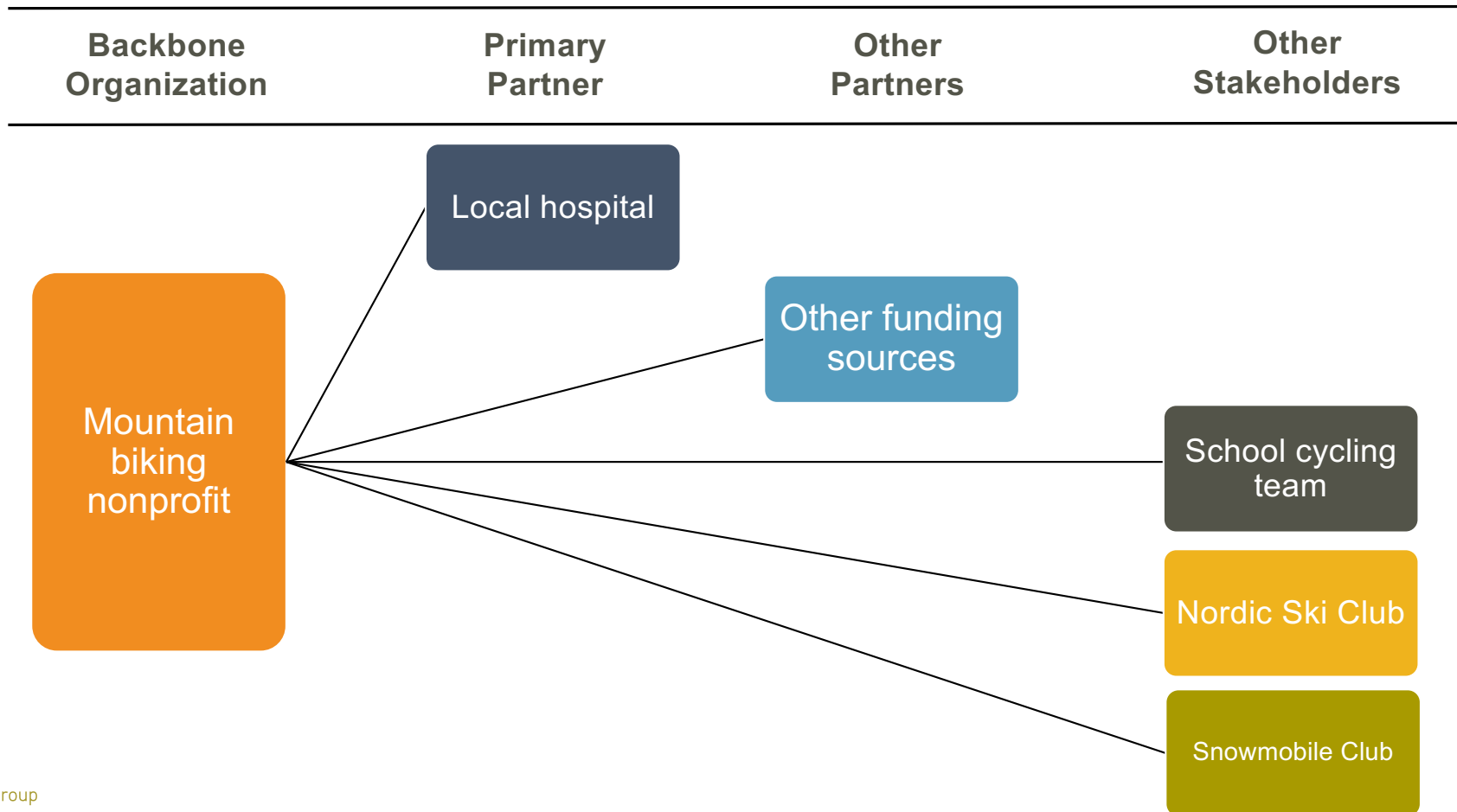
## Isolated Impact: aka Swirling Stakeholders



*“Nearly 1.4 million nonprofits try to invent independent solutions to major social problems, often working at odds with each other and exponentially increasing the perceived resources required to make meaningful progress.”*



## Collective Impact: Aligned Partners and Stakeholders



Do what you do best and partner for the rest.

# Putting it into practice



“Just do it.”

Nike



## Coordinated Partnership Exercise

Envision successful outcome(s)



Create a stakeholder list



Identify Stakeholder values and assets



Identify potential partners



Plan for Collective Impact

## Coordinated Partnership Exercise

Envision successful outcome(s)



```
graph TD; A[Envision successful outcome(s)] --> B[Create a stakeholder list]; B --> C[Identify Stakeholder values and assets]; C --> D[Identify potential partners]; D --> E[Plan for Collective Impact];
```


Create a stakeholder list

Identify Stakeholder values and assets

Identify potential partners

Plan for Collective Impact

# Coordinated Partnerships and Collective Impact Worksheet




### Coordinated Partnerships

The purpose of this coordinated partnership is to help you identify your various stakeholders and align their own involvement in the role of the individual and/or the organization. This coordinated partnership is designed to help you: **Establish the Stakeholder List, Coordinate Stakeholder List, Identify Stakeholder Values and Assets, Identify Potential Partners, and Plan for Collective Impact.**

**Part 1: Establish Successful Outcomes**

Draw a picture of something that represents what a successful outcome of your collaborative effort will look like. Extra space for use of multiple colors and images.



### Part 2: Create a Stakeholder List

**Instructions:**

List stakeholders by group or organization in the list below of the table below the table. This is an example of how to use the table.

1. For each group or organization, identify a primary point of contact.

Stakeholder Group or Organization	Point of Contact	Telephone

**Part 3: Identify Stakeholder Values and Assets**

**Instructions:**


Identify the stakeholders from your Stakeholder List to the appropriate category (Contributors, Supporters or Observers) in the table below. Give stakeholders any belong to more than one category.

2) Write down your perception of each stakeholder's values (what values they hold) and list at least 10 values (fill in the table that table in the table below).

**Examples of Values, Assets and Assets:**

Examples of Values: Integrity, Honesty, Respect, Accountability, Transparency, Openness, Empathy, or Advocacy and good acceptance, formal rules and ethics.


Examples of Assets: Time, Resources, political support, administration skills.



### Part 4: Identify Potential Partners

As you develop your coordinated partnership strategy, it is important to understand the various roles and your identified stakeholders have on your own efforts. This is an example of how to use the table.

The mapping process will help you identify the various stakeholders and partners that can assist you in the implementation of the strategic plan.



**Contributors:**

Stakeholder Group or Organization	Value	Assets

**Supporters:**

Stakeholder Group or Organization	Value	Assets

**Observers:**

Stakeholder Group or Organization	Value	Assets

**Instructions:**

Using the Stakeholders' Values and Asset List and the Stakeholder Support Table (See Contributors, for your Stakeholders 1 to the appropriate position).

**Contributors:**

Contributors require significant participation in the plan and shared vision for change, and are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

**Supporters:**

Supporters require significant participation in the plan and shared vision for change, and are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

**Observers:**

Observers require significant participation in the plan and shared vision for change, and are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

**Part 5: Plan for Collective Impact**

The Standard Model for Collective Impact describes a collective impact model as follows:

1. **Common Agenda:** A common agenda is a shared vision for change, and is critical to a common understanding of the situation and a shared mission to achieve a shared vision.

2. **Measurement & Evaluation:** Measurement and evaluation are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

3. **Continuous Improvement:** Continuous improvement is critical to a common understanding of the situation and a shared mission to achieve a shared vision.

4. **Communication & Collaboration:** Communication and collaboration are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

5. **Leadership & Governance:** Leadership and governance are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

6. **Measurement & Evaluation:** Measurement and evaluation are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

7. **Continuous Improvement:** Continuous improvement is critical to a common understanding of the situation and a shared mission to achieve a shared vision.

8. **Communication & Collaboration:** Communication and collaboration are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

9. **Leadership & Governance:** Leadership and governance are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

10. **Measurement & Evaluation:** Measurement and evaluation are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

11. **Continuous Improvement:** Continuous improvement is critical to a common understanding of the situation and a shared mission to achieve a shared vision.

12. **Communication & Collaboration:** Communication and collaboration are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

13. **Leadership & Governance:** Leadership and governance are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

14. **Measurement & Evaluation:** Measurement and evaluation are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

15. **Continuous Improvement:** Continuous improvement is critical to a common understanding of the situation and a shared mission to achieve a shared vision.

16. **Communication & Collaboration:** Communication and collaboration are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

17. **Leadership & Governance:** Leadership and governance are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

18. **Measurement & Evaluation:** Measurement and evaluation are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

19. **Continuous Improvement:** Continuous improvement is critical to a common understanding of the situation and a shared mission to achieve a shared vision.

20. **Communication & Collaboration:** Communication and collaboration are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

21. **Leadership & Governance:** Leadership and governance are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

22. **Measurement & Evaluation:** Measurement and evaluation are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

23. **Continuous Improvement:** Continuous improvement is critical to a common understanding of the situation and a shared mission to achieve a shared vision.

24. **Communication & Collaboration:** Communication and collaboration are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

25. **Leadership & Governance:** Leadership and governance are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

26. **Measurement & Evaluation:** Measurement and evaluation are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

27. **Continuous Improvement:** Continuous improvement is critical to a common understanding of the situation and a shared mission to achieve a shared vision.

28. **Communication & Collaboration:** Communication and collaboration are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

29. **Leadership & Governance:** Leadership and governance are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

30. **Measurement & Evaluation:** Measurement and evaluation are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

31. **Continuous Improvement:** Continuous improvement is critical to a common understanding of the situation and a shared mission to achieve a shared vision.

32. **Communication & Collaboration:** Communication and collaboration are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

33. **Leadership & Governance:** Leadership and governance are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

34. **Measurement & Evaluation:** Measurement and evaluation are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

35. **Continuous Improvement:** Continuous improvement is critical to a common understanding of the situation and a shared mission to achieve a shared vision.

36. **Communication & Collaboration:** Communication and collaboration are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

37. **Leadership & Governance:** Leadership and governance are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

38. **Measurement & Evaluation:** Measurement and evaluation are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

39. **Continuous Improvement:** Continuous improvement is critical to a common understanding of the situation and a shared mission to achieve a shared vision.

40. **Communication & Collaboration:** Communication and collaboration are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

41. **Leadership & Governance:** Leadership and governance are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

42. **Measurement & Evaluation:** Measurement and evaluation are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

43. **Continuous Improvement:** Continuous improvement is critical to a common understanding of the situation and a shared mission to achieve a shared vision.

44. **Communication & Collaboration:** Communication and collaboration are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

45. **Leadership & Governance:** Leadership and governance are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

46. **Measurement & Evaluation:** Measurement and evaluation are critical to a common understanding of the situation and a shared mission to achieve a shared vision.

47. **Continuous Improvement:** Continuous improvement is critical to a common understanding of the situation and a shared mission to achieve a shared vision.

48. **Communication & Collaboration:** Communication and collaboration are critical to a common understanding

1. Draw a picture!



Imagine the desired outcome and draw it.



Extra points for use of color and symbolism!!

## 2. List your stakeholders

Start a list of stakeholders who have involvement in your area of focus

Stakeholder Organization	Point of Contact	Title/Role
EXAMPLE		
City Economic Development Department	Joanna Garcia	Economic Development Director



### 3. Identify stakeholder values and assets

## Sort your stakeholders in relation to your area of focus

Capture perception of each stakeholder's values (what drives their focus) and their assets (what they bring to the table) that relate to your specific focus for the tourism industry.

- **Examples of Values:** Loyalty and trust; commitment to innovation, development; emphasis on achievement and goal accomplishment; formal rules and policies
- **Examples of Assets:** Team resources; political support; administration funds

Stakeholder Organization	Values	Assets
City Economic Development Department	<ul style="list-style-type: none"><li>- Equity – focus on underrepresented populations</li><li>- Growth – expansion of economic pie</li></ul>	<ul style="list-style-type: none"><li>- Funding programs for small business</li><li>- Political support</li></ul>

# Sort your stakeholders in relation to your area of focus

Sort into: **Constituent, Supporter, or Opposition.**

- Some stakeholders may belong in more than one category.



## **Constituent:**

Those who are directly involved in your industry or area of focus.



## **Supporter:**

Those who are not directly involved in your area of focus but may find it in their interest to support it.



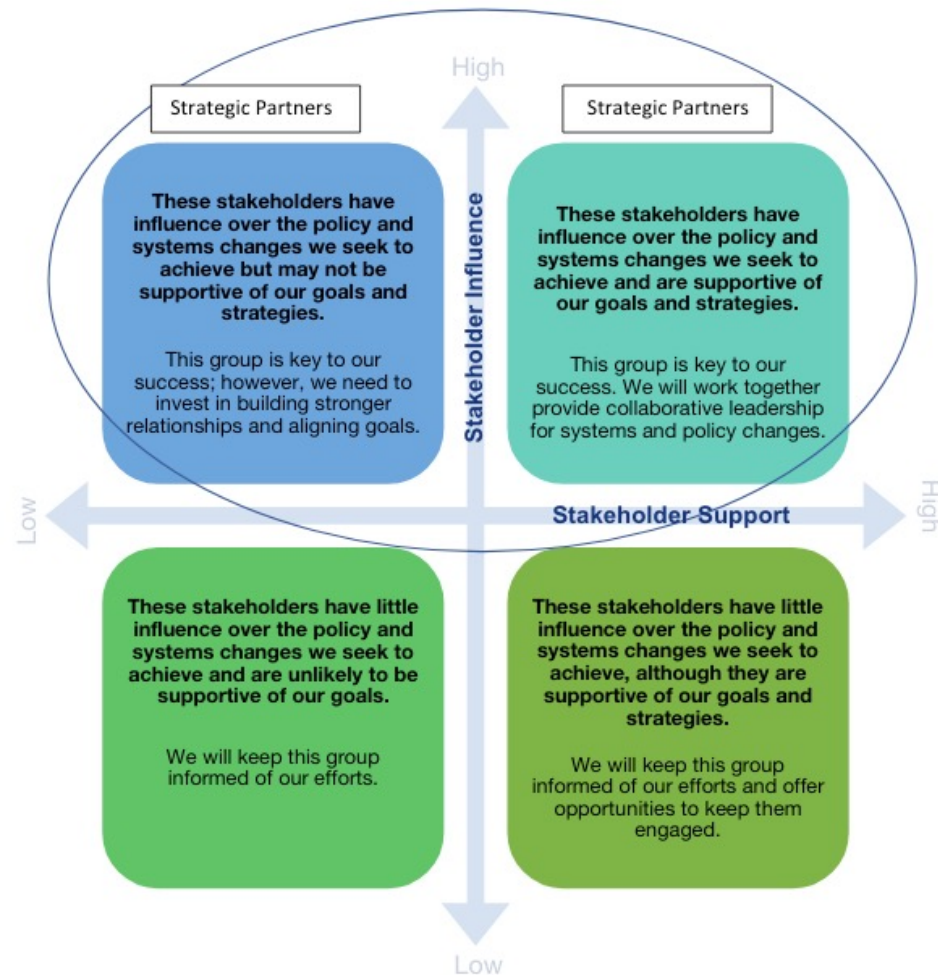
## **Opposition:**

Those who may be against our area of focus or who share interest in your area of focus yet have significantly different ideas on how to go about the work.

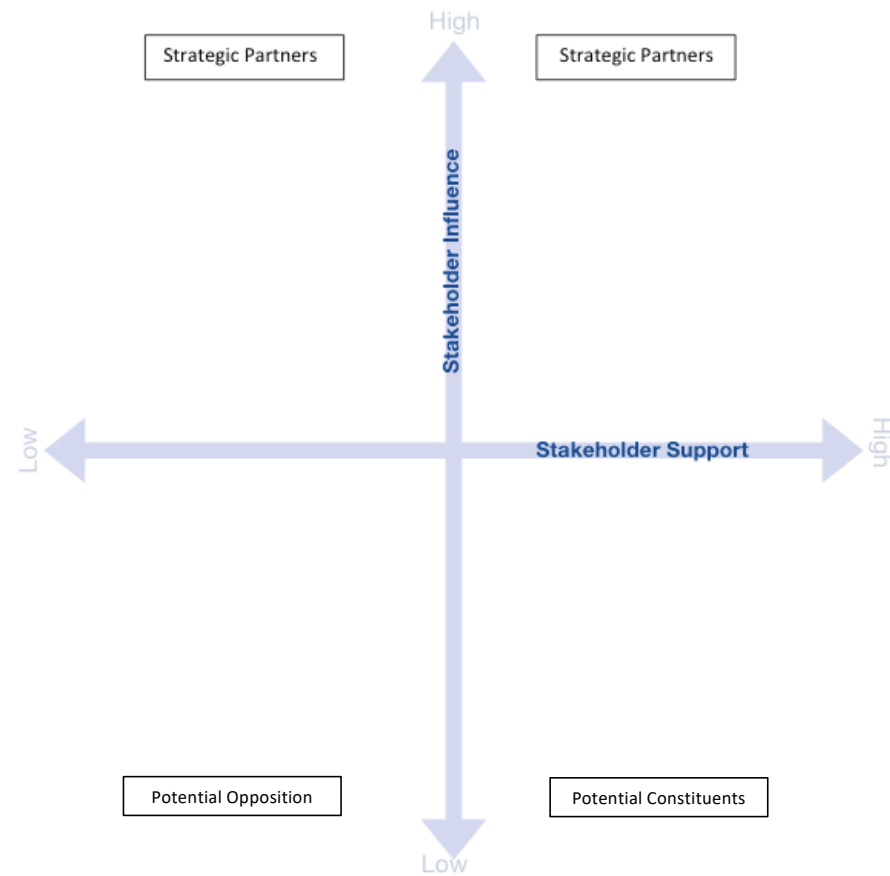
## 4. Identify potential partners



## Assign your stakeholders to the appropriate quadrant



Assign your stakeholders to the appropriate quadrant



## 5. Build your plan with your partners

# Sample Partner Questions to Ensure Alignment

## Common Agenda

Collective impact requires partners/stakeholders to have a shared vision for change, one that includes a common understanding of the problem and a shared approach to solving it through collective action.

- What is our individual understanding of the situation? Are we dealing with the same set of issues or problems?
- What issues or problems do we have in common?
- What should be our primary shared goal(s)?

## Measures of Success

A common agenda will be ineffective without agreement on how to measure success and impact.

- Specific to our common agenda, what does success look like? What will we collectively measure and report?
- Do we have the capability to collect the necessary data and report on our progress?

## Mutually Reinforcing Efforts

Collective impact initiatives depend on a diverse group of stakeholders working together, not by requiring that all organizations do the same thing, but by encouraging each participant to undertake the specific set of activities at which it excels in a way that supports and is coordinated with the actions of others.

- What unique and specific set of activities will each organization take to further our common agenda and measure(s) of success?
- How will we support each of our unique efforts?

## Governance and Communication

Collective impact requires leadership, from within each participating organization and across the group.

- How will we hold each other accountable?
- Are the leaders (organization Directors, CEOs, Executives, etc.) of participating organizations directly involved and committed?
- Who will formally participate in our governance committee?
- How often should we convene as a group?
- What communication tools/approaches will we use to keep partners/stakeholders informed?

## Backbone Support Organization

The expectation that collaboration can occur without a supporting infrastructure is a common reason why such efforts fail. Identifying dedicated resources and leadership will be critical for success.

- What does our supporting infrastructure look like?
- Is there dedicated staff focused on ensuring the common agenda is implemented?
- Do we have budget resources identified and allocated?

Questions?







Thank you!

[Sara@CoraggioGroup.com](mailto:Sara@CoraggioGroup.com)

## Resources and additional reading

- MIT Sloan Management Review: *When Collaboration Fails and How to Fix It*, by Rob Cross & Inga Carboni
- Stanford Social Innovation Review: *Why Collaborations Fail*, by John Huggett
- Stanford Social Innovation Review: *Collective Impact*, by John Kania & Mark Kramer
- [www.CambaTrails.org/hospital](http://www.CambaTrails.org/hospital)
- [www.JustImagineSWLA.org](http://www.JustImagineSWLA.org)
- [www.VisitLakeCharles.org/rebuilding-swla/](http://www.VisitLakeCharles.org/rebuilding-swla/)

