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Funder Collaborations – Flourish or Flounder?

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Keywords: Education philanthropy, education reform, system change, collaboration, collaborative funder partnerships, pooled funding

Background: What We Know About Collaboration

From years of research and practitioner experience on collaboration, our sector has several helpful frameworks and tools to guide the development of funder partnerships. These tools identify common considerations:

- **A clear mission:** Collaboration is most powerful when it's directed toward a particular end that each foundation cannot reach on its own. For example, GrantCraft advises funders to “stipulate goals and purpose very early on in the process” to avoid “drifting away from what they were originally formed to achieve” (Gibson & Mackinnon, 2009, p. 12). This means that funders need to understand their desired outcomes and be able to articulate how the collaboration — as opposed to independent actions — can help them make progress toward those goals.
- **Honest relationships:** When the Bridgespan Group set out to find lessons learned from the David and Lucile Packard Foundation's many collaborations, it concluded, “Nearly everyone we spoke to emphasized the importance of developing strong working relationships with partners” (Huang & Seldon, 2014, p. 11). Trust, mutual respect, honesty, and sensitivity to each other's institutional culture are necessary. These conditions are especially relevant when funders are working together for the first time.
- **Different forms for different functions:** We usually talk about funder collaboration as pooled funding. But collaborations come

Key Points

- Funders regularly collaborate to leverage their influence, channel their funding, and mobilize grantees in the same direction. Our sector's default assumption is that more collaboration is better — even as too many collaborations end with a whimper instead of a bang. Why do some funder collaborations flourish, and others flounder?
- The William and Flora Hewlett Foundation and Education First participated in a half-dozen joint funding efforts to support the success of the Common Core State Standards in the nation's K–12 public education system. Looking critically at these efforts, we learned lessons about why some collaborations are more effective.
- Funder collaborations work best when participants recognize key milestones in a partnership and make decisions at each of these stages to set up success: defining the problem and agreeing on clear goals and strategies that leverage the unique value of collaboration; taking action aligned to shared objectives through nimble decision-making, defined lines of authority, and strong support and expertise; and setting criteria for success that allow participants to know what they are accomplishing, honestly assess their progress along the way, and determine the right next steps.

in many shapes, each presenting “looser” or “tighter” ways to work together toward a common goal. Collaborations can vary in intensity, including “learning together” and coordinating or aligning grantmaking in

addition to pooling funding. Looser, but still valuable, collaborations can include developing a common vision or set of practices to guide grants in an area or meeting regularly to assess progress of common grantees.

- **Strong backbone management:** Funders must establish an efficient structure with appropriate norms for implementing their day-to-day collaboration. There needs to be an approach and a process for convening and making decisions, exploring opportunities for action, and revisiting priorities as the policy landscape evolves. A Grantmakers for Education case study of the Donors' Education Collaborative of New York City reports that funders recognized early on that they needed someone to facilitate strategy discussions, manage grantee work plans, and keep the work moving forward — and this consultant became, according to one participant, the “incredible and necessary glue that held everything together” (Mackinnon, 2006, p. 11).
- **Flexibility and humility:** Some practices in our sector, including inflexible grantmaking structures and processes, can discourage collaboration. Paul Brest (2006), former president of the Hewlett Foundation, noted that funder egos and a “turf” mentality can get in the way of a strong partnership. Being honest about these challenges can help funders increase their likelihood of finding common ground. Brest also observed that collaboration has inevitable upfront costs in the time and effort spent in communicating and making decisions with one's partners. “At the end of the day,” he counseled, “the extra effort is justified only if it has greater impact in improving people's lives” (p. ix).

Life Cycles of Collaborations in an Era of New Education Standards

When the Common Core State Standards were finalized in 2010, many of us working to improve schools saw them as a potentially powerful catalyst for change, especially in making sure that underserved students have access to high-quality

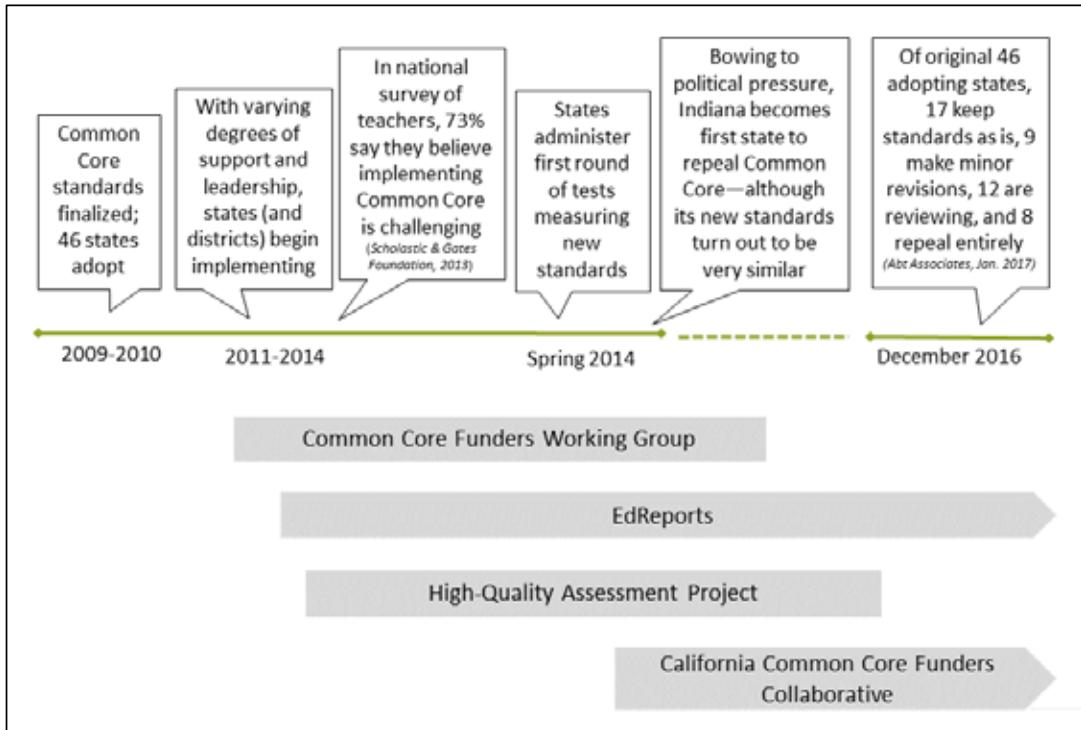
Together, we responded in a variety of ways to address different challenges to the standards' success, from a lack of high-quality textbooks, tests, and teaching materials to concerned parents and political opposition. Our joint efforts included pooled grantmaking funds, knowledge networks, technical-assistance efforts, and even new organizations to fill emerging leadership and capacity gaps.

teaching and learning environments. The standards describe the problem-solving, thinking, and writing skills all students must have in the 21st century. With over 40 states adopting them, they represented a broad agreement on what all students need to learn to succeed, no matter where they live or their plans after high school. This consensus has created a nationwide platform for helping educators across states teach more effectively, rather than continuing to re-create unique supports for different states and districts. Along with many other education funders, we hoped that coordinating and collaborating wherever possible to help the nascent standards succeed could help us all make a greater difference.

Together, we responded in a variety of ways to address different challenges to the standards' success, from a lack of high-quality textbooks, tests, and teaching materials to concerned parents and political opposition. (See Figure 1, which places the collaborations in this article in context of major developments

FIGURE 1 Common Core: Major Milestones and Select Funder Partnerships

Starting in 2012, funders worked together in multiple ways to help tackle a variety of emerging challenges related to implementation of Common Core.



in implementation of the standards.) Our joint efforts included pooled grantmaking funds, knowledge networks, technical-assistance efforts, and even new organizations to fill emerging leadership and capacity gaps. (See Table 1.) Our partners included diverse funders such as the Bill & Melinda Gates, Helios Education, Lumina, and Schusterman foundations; the Leona M. and Harry B. Helmsley Charitable Trust; and many local foundations focused on supporting school districts in their home cities. These experiences with working to advance the same issue in different ways and with many of the same funders led us to reflect on why some of the collaborations flourished and some floundered.¹ In initiating these partnerships we worked to follow the good advice described above, but our collaborations still got stuck in places.

We found that thinking about the life cycle of a collaboration, much as we often do about the nonprofits we support, helped. The work of a collaboration shifts over time, raising different problems at each stage. We identified which decisions successfully moved the work along at these key milestones — and which decisions (or lack of decisions) got in the way of progress. And, while our observations draw from work in the education sector, our advice can apply to other fields as well. Broadly, funder collaborations typically pass through at least three stages of development: startup and ideation, implementation, and maturation and maintenance. Below, we’ve elaborated on these decisions and how they can impact (or impede) success and progress at each stage, drawing on examples from our recent experiences.

¹ For Education First’s analysis of our different partnerships and recommendations, see <http://education-first.com/library/publication/how-funder-collaborations-flourish-lessons-from-the-common-core-standards>.

TABLE 1 Education Funder Collaboration Details

Funder-Led Efforts to Support Educators and Policymakers in the Transition to Common Core State Standards

Name	Start Date	Goal/Strategy	Beginning Governance	Type of Collaboration	Intended Time Frame
Common Core Funders Working Group	Fall 2012	Provide information about gaps, lessons learned, and emerging practices to help individual funders strengthen their grantmaking strategies as they support changes needed to implement Common Core standards in states and districts	4 national funders, 2 local funders, 3 grantmaking networks	Learning network	Fall 2012 to Fall 2015 (3 years)
EdReports.org	Early 2013	Conduct evidence-based reviews of instructional materials to increase the capacity of educators to seek, identify, and demand the highest-quality materials	3 national funders, transitioning to new board of directors with no funders	New nonprofit	Ongoing/permanent
High-Quality Assessment Project	Fall 2013	Make grants, provide technical assistance, and strengthen the capacity of advocacy organizations and policymakers to communicate the benefits of more sophisticated, performance-based tests	5 national funders	Pooled grantmaking fund	Fall 2013 to Fall 2015 (2 years), subsequently extended an additional year
California Common Core Funders Collaborative	Fall 2014	Focus philanthropic efforts on the greatest needs with implementation of the new standards, facilitate collaboration, and provide information to help individual funders strengthen their own grantmaking	3 national funders; 3 California state and local funders	Aligned grantmaking originally, then transitioned to learning network	Fall 2014 to Winter 2016 (potentially 2 years with intention to revisit after 1 year; extended an additional year)
Not discussed in article					
Core to College	Mid-2012	Facilitate greater coordination between K–12 and postsecondary systems in implementing Common Core standards and aligned assessments (with grants to 12 states)	4 national funders	Pooled grantmaking fund	Mid-2012 to mid-2015 (3 years)
Collaborative for Student Success	Early 2013	Ensure fact-based discussions about new standards and assessments in national media, support local advocates to educate stakeholders	7 national funders, 1 state-based funder	Pooled grantmaking fund that transitioned to new nonprofit	Not specified at beginning, but now ongoing/permanent

The Working Group sparked well-informed conversations, and the exchange of ideas informed participants' grantmaking choices. But by fashioning itself strictly as a knowledge network, the Working Group lacked mechanisms to help funders — on their own, in partnership, or with the field — move toward concrete actions to address the most pressing problems we uncovered.

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How Will We Know Our Collaboration Is Making Progress?

Collaborating funders must grapple early on with the twin questions of what exactly they are doing together and how they will know it's successful. We don't believe funders always need a defined solution at the front end; many social problems are complex and require adaptive approaches. But even in the absence of a clear strategy, collaborations need clear goals, clarity about the problem the collaboration is attempting to tackle, and some way of knowing whether progress is being made.

Stage No. 1 — Getting Off on the Right Foot: Startup and Ideation

The Common Core Funders Working Group, one of the first funder partnerships created in response to the new standards, emerged from informal conversations among education grantmakers in 2011. All of us asked: What help could philanthropy offer to maximize this moment of tremendous change? We designed the Working Group as a knowledge-sharing network. With the help of Education Funder Strategy Group, Grantmakers for Education, and the Growth Philanthropy Network, dozens of funders committed to convene regularly to learn from researchers and practitioners about key challenges and needs as schools were beginning to roll out the Common Core. We set a three-year timeline for our work, from 2012 to 2015, to coincide with when we expected schools to face the toughest obstacles. During our first year, the Working Group enlisted systems-change expert Peter Senge to help craft a "systems map" to flag specific areas in the education field that needed attention.

One practical way to compel this sort of clarity is to set a notional end date for the collaboration at the beginning, which funders can, of course, extend. This forces participants to define what they hope to accomplish within a certain window and enables a graceful exit if the group does not meet those goals. In hindsight, the three-year time frame we set for the Working Group was too long; indeed, it continued to pursue its learning agenda even as some funders moved on. Instead, one year probably would have been enough to equip funders with the know-how to make wise grantmaking choices in the Common Core era, and then we should have ceded to, and help set up, more action-oriented efforts focused on specific, thorny problems.

As a knowledge network committed to hazy goals of informing the field, the Working Group didn't provide a venue to set desired goals and strategies with specificity or a method to know if we were succeeding. (By the way, we didn't refer to the Working Group as a knowledge network at the time; naming it as such — and recognizing at the beginning both the potential and limitations of a group of funders interested only

in learning together — might have helped us set crisper and more realistic goals for our work.) Also, in seeking to be a big tent for all funders to learn, we may have erred in not encouraging participants to more rigorously elevate and resolve individually divergent theories of action for which solutions would solve which problems. Creating an effective partnership requires finding ways to surface tensions and disagreements in creative and constructive ways.

How Are We Creating Shared Ownership and Commitment to the Partnership?

Although the Working Group's budget was underwritten by four national funders who split the costs equally, we worked hard to engage non-contributing funders as members of our steering committee. Still, their participation — and, really, their buy-in — was uneven. Investing time isn't the same as having skin in the game. And without a complementary financial contribution, we saw that it's very hard for anyone to prioritize and sustain a commitment to a collaboration, despite the best intentions.

In early 2013, the Working Group's same founding funders (the Gates, Hewlett, and Lumina foundations and the Helmsley Trust) identified a more action-oriented, pressing problem to work on together. While not an exciting issue, we knew that the tests states were using to measure standards and hold schools accountable had to evolve to match the critical-thinking and writing skills the Common Core emphasized. What gets measured matters, and continued use of decades-old multiple-choice tests would discourage educators from taking the new expectations seriously. Our response was to organize the High-Quality Assessment Project (HQAP), which pooled resources to make grants, provide technical assistance, and strengthen the capacity of advocacy organizations in a dozen states working to communicate the benefits of more sophisticated, performance-based tests. In addition to the original four foundations that had been discussing this problem, we recruited another donor, the Schusterman family, that had political and advocacy expertise and support. These five funders were all involved in getting the HQAP

While the HQAP explored the possibility of recruiting other funders to help, there never seemed a good opportunity to successfully bring others into the collaboration and get their buy-in for the goals, decisions, and strategies that we worked hard in the beginning to jointly develop. Unlike a learning network, pooling resources and sharing grantmaking decisions with others requires a more significant commitment, a stronger value proposition, and real clarity about how well the fund will be advancing each funder's individual strategies.

off the ground and steering its work throughout its intended short-term life.

Recruiting your partners is easier at the beginning, when everyone can play a role in creating what the shared work will be, than trying to enlist them down the road. While some funders want to see some initial evidence of progress before signing on, we found the early conversations about goals and purpose represent the best opportunity to attract the attention and engagement of other funders. Just as important, having all collaborating funders present at the beginning — when ground rules are set, ideas are advanced or discarded, and compromises are made — helps a collaboration operate efficiently over its entire life cycle. While the HQAP explored the possibility of recruiting other funders to help,

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With the HQAP, we had the benefit of a small group of funders, all present at the beginning, who took six months to sort out and clarify the specific problem we would be working on and the specific goal we were going to accomplish. Once those key issues were resolved, each funder could then decide how much — or even whether — to give, depending on how closely aligned the final approach was to their own priorities. In the end, all five funders contributed, although in different amounts; regardless of contribution, we decided the HQAP should be governed by consensus and not by contribution amount.

All these early steps in the startup process also matter because the group's definition of the problem to be solved should guide the partnership's structure, strategies, and activities. While it can be useful to start with a slower-going "big tent" approach to get a collaboration off the ground, funders should be wary of getting stuck there. Agreeing on a timeline for actions and expected

results can ensure participants don't get bogged down debating every nuance.

While some of these conclusions may be obvious in hindsight, they are still worth stating. Few funders operate with the same theory of change or the same grantmaking outlook, and combining funding may be the best way to truly and successfully force the question of how to reconcile and how to meet (or not) the various interests of different funders.

Stage No. 2 — Moving to Action: Implementation

Once funders have identified both a clear problem and a clear strategy for their work together, collaborations move to action. Here too, key decisions along the way can affect whether the work goes smoothly or off track. Many funder collaborations choose to focus on policy advocacy and communications, and many of our Common Core partnerships worked to sustain, extend, or defend important policymaker decisions to endorse and support the new standards and their implementation. Collaboration is attractive because pooling resources can be an effective vehicle for organizing and mobilizing advocates and achieving larger-scale impact in a potentially chaotic arena.

What Decisions Will We Make and Which Will We Delegate?

All the reasons that funding advocacy can be challenging for a single funder are amplified when a group of funders are involved. Collaborators must be clear about individual and group processes for making grant decisions, balancing inclusiveness with being nimble. They need to decide when and which decisions they'll make themselves, and when and which decisions will be trusted to an intermediary, consultant, staff, or smaller group of designated leaders. Lack of clarity about governance leads to delay or, worse, distrust. Collaborators also need a process for reacting to unanticipated policy openings or setbacks.

We knew informed advocacy would be a critical ingredient to getting state leaders to adopt and

keep new tests that align to the Common Core. As noted above, traditional multiple-choice tests could not measure the critical-thinking and writing skills now expected of students. Initially, as states adopted the new standards, most policymakers understood this need for better measures and committed to overhauling state tests. One key way many states tackled this challenge was by participating in one of two consortia working to create a common test for member states to use. But by 2014, contentious debates about testing erupted around the country. Vocal critics questioned the use of new tests that took more time, asked harder questions, and relied more on technology; some even called for abolishing testing altogether. And state policymakers, caught in the middle, started wavering on their earlier commitment.

In its early days, the HQAP regularly got stuck in the process of deciding how to spend its funds given so many unique state needs. We also argued about whether the HQAP was focused on national communications and media, or state-specific advocacy. In some cases, after much deliberation about the right course of action in a state, political circumstances had moved on and our chosen approach was no longer relevant. As the manager of the HQAP, Education First often invested excessive resources in serving up time-sensitive decisions and options on which the funders were slow to act, taking away energy from managing and leading the actual work of making grants and supporting grantees.

The conventional wisdom is that collaborations can solve this problem if one lead foundation has the capacity to serve in a “backbone” role and assign staff to manage the work, or if funders retain a third-party organization to execute these responsibilities, as we did by engaging Education First. However, as our experience with the HQAP shows, simply hiring a manager isn’t enough. The HQAP only hit its stride once we augmented our shared goal with clear measures of success and an adaptable strategy: We identified the states we would support, defined what counted as a policy “win,” and then gave Education First significant flexibility to tailor the HQAP’s approach based on the policy context in each state, including the

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ability to make opportunistic grants on behalf of the HQAP based on our priorities.

A focus on policy advocacy requires collaborating funders to be highly flexible. As Paul Brest (2012) wrote in *Stanford Social Innovation Review*, supporting policy advocacy is “risky business” for philanthropy because there is no certainty of success: political fortunes of policymakers may change, alliances may form or strain under pressure, and what counts as a “win” can change from one week to the next. As it matured, the HQAP was most successful once it had clear, shared objectives and nimbler decision-making processes to act on those objectives.

Policy advocacy is not the only opportunity for collective action. By design, a sweeping policy change, such as the adoption of more rigorous standards to guide teaching and learning in thousands of schools, has major systemwide implications. While getting the policy right and in place is important, just as important is quality implementation and building the capacity of the field to act differently in response to new policy directions.

What Support and Insights Do We Need to Complement Funder Perspectives?

In 2013, the Annenberg Retreat at Sunnylands gathered educators, mathematicians, scientists, and business and foundation leaders to tackle the challenge of improving mathematics achievement in the U.S. The group zeroed in on a big obstacle: the mismatch between the high expectations for math in the Common Core and other K–12 standards aiming to prepare students

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for college and careers, and the overall low quality of math textbooks that teachers could readily access. The experts at Sunnylands asked: How can state agencies and school districts know which textbooks were of the highest quality and would best support educators? They proposed the creation of an independent *Consumer Reports*-like reviewer to assess the quality and Common Core alignment of teaching materials in the marketplace. Three foundations — Hewlett, Gates, and Helmsley — stepped up to help make this recommendation a reality. Relying on strategy design and initial staff support from Education First, we funded a new nonprofit organization, EdReports.org, to disseminate free and publicly available reviews of math textbooks.

By early 2014, many funders had been working side by side in various ways and with various commitments to support the new standards, and had a good sense of each other's priorities, interests, and style of engaging. Given EdReports.org's stated goal of disrupting the marketplace with independent textbook reviews, having the support of three funders (and not just one) from

the beginning was important. Also important: our early decision that the organization had to be truly independent in order to establish a credible, impartial brand separate from the funders — which meant that we co-founders would be very hands-off. The foundations deliberately asked educators, board members, and Education First to shape the early decisions about governance, structure, staffing, and priorities. We saw our grants as general operating support, unlike other collaborations where funders were much more “in the weeds” of the work itself.

To put a collaborative strategy into motion successfully, funders must determine early what content expertise they need to develop internally or seek externally to inform their strategies and activities. In creating EdReports.org, we recognized that others had the knowledge and credibility required to conduct rigorous evaluations of textbooks. In fact, EdReports.org recruits and trains experienced educators to carry out an evaluation methodology developed in consultation with subject-matter experts.

Foundations often have difficulty organizing themselves in a collaboration for extended periods of time. Whether focused on advocacy or on implementation/capacity-building efforts, we found a collaboration is stronger when it thinks about itself as a campaign: What is the specific need, what is the time frame to influence change, and how will we know if we've won? And poor execution, poor decision-making, and poor support can threaten the success of a collaboration even if it has a well-defined problem in its sights. Again, we recognize that not all collaborations (or problems in the field) have readily identified solutions; a collaboration can be about testing, identifying, and showcasing new approaches — although, as the EdReports.org collaboration underscores, having a clear solution at the beginning definitely helps. But in all cases, our collaborations floundered when there wasn't a process for ensuring the partnership was moving forward and funders instead kept rehashing and revisiting the same problems.

Stage No. 3 — Staying on the Right Path: Maturation and Maintenance

Are we still better together than alone? Posing this simple question early and often helps funders understand whether their collaboration is an effort worth continuing. But getting to an answer requires well-defined criteria for the collaboration's success, along with a strong process to monitor outcomes. Growing into the maturation phase of a partnership means being able to see evidence pointing to meaningful and measurable change. If this change is not happening (and there could be many different reasons for this, as we describe below), funders should weigh the benefits of their collaboration and perhaps significantly change the focus or even decide to spend their time and resources elsewhere.

Why Aren't Funders Showing Up Any More?

In some of our collaborations, we noticed signs that something had gone awry:

- **Low or declining commitment:** Funders invest fewer resources, as measured by smaller grant commitments or aligned investments, and/or they attend fewer meetings, participate less in discussions, and decline to volunteer in shared activities.
- **New developments or transitions:** Foundation staff turnover leads to new individuals being assigned to the collaboration who are not as personally invested in the work or who question the foundational decisions made by the group, and/or an individual funder's grantmaking strategies shift direction, resulting in misalignment with the collaboration's purpose and objectives.
- **Internal dysfunction:** Repeated failures to make group decisions translate into lost opportunities for action, and/or disagreements over aspects of the collaboration's work—from the core mission and goals to the chosen strategies and timelines—remain unresolved or papered over.

Reflecting on our different Common Core-focused collaborations, it's important for funders

With our sector's focus on collegiality, we sometimes find it easier to drift away or quietly quit than proactively raise difficult questions about strategy and impact. Building deliberate opportunities for these candid discussions, rather than hoping they'll emerge organically, is one solution we found.

to have an honest conversation about these indicators and decide on ground rules for resolving the underlying issues causing these problems. Instituting regular check-in meetings to gauge internal dynamics and discuss the progress made toward goals is one effective practice for maintaining a healthy collaboration. With our sector's focus on collegiality, we sometimes find it easier to drift away or quietly quit than proactively raise difficult questions about strategy and impact. Building deliberate opportunities for these candid discussions, rather than hoping they'll emerge organically, is one solution we found. The HQAP went through this stock-taking with its funders annually, with some using the opportunity to move on if they weren't satisfied or if their strategies had shifted, and others using it to "re-up" their commitment.

How Do We Know It's Time to Change or Wrap Up Our Collaboration?

At these check-in meetings, funders should take stock of the interim results of their work, including milestones achieved by the group and their shared grantees, and fairly evaluate three options for the collaboration's future: continuation, reset, or exit. If there are promising short-term results and evidence of a persistent unmet need in the field, funders may continue the collaboration

in its current form, making ongoing strategy adjustments as appropriate.

Funders can reset their partnership if they determine that their collaborative structure is no longer suitable to solve the problem. A reset is not about starting over from scratch; rather, it could mean revisiting previously agreed-upon structures and measures of success to ensure strong alignment between form and function. Funders in a knowledge network, for example, might more intentionally transition some of their work together into a pooled fund to tackle a particularly vexing or immediate problem of shared interest. Jointly creating a nonprofit organization to continue to lead on a particular issue is also an option, especially if the problem is long-standing and knotty and others in the field don't have the capacity to tackle the issue well.

Finally, there's exit — disbanding the collaboration itself. Some funder partnerships start with an end date, which we strongly recommend. Although the date may change upon further deliberation and experience, discussing the exit decision upfront preempts any confusion down the line. It also forces a “go/no go” decision based on the merits and progress, rather than allowing the collaboration to continue based solely on its own momentum or the polite inability of participants to call it quits.

Sometimes these difficult decisions become even more challenging if the collaboration has created an infrastructure, including dedicated staff or consultants, which would be disbanded if the collaboration were to cease. On the other hand, not having infrastructure can readily lead to analysis paralysis; how best to balance these twin risks of committing too much too soon versus not committing enough too early is another early decision to tackle explicitly. Disappointing outcomes can happen even to the most strategic funder collaboration, due to circumstances beyond anyone's control. Still, in the absence of positive results, funders should be more willing to pull the plug and move on to other pursuits.

The HQAP was created and charged with working for two years (2013-2015). The funders agreed — after a formal meeting to assess progress and examine options for next steps, including shutting down as originally conceived — to recommit for a third year of grantmaking, as arguments about whether to use new tests were still strong in many states. But, regardless of a two- or three-year effort, the HQAP was always clear with its grantees that the effort would be a short-term one. This approach also allowed Education First to prioritize grants and activities that were more about building knowledge, capacity, and expertise among a variety of organizations to continue working successfully on implementation challenges for the standards after the HQAP's burst of grantmaking was over.

Our partnership in one state, with the California Common Core Funders Collaborative, is instructive in a different way. The effort included a diverse mix of California-focused funders such as the S.D. Bechtel, Jr. and Silver Giving foundations, as well as the Gates and Hewlett foundations, national funders with a deep interest in the state. Conceived in late 2014 as no more than a two-year partnership to organize co-funding opportunities, commitments started waning after year one. While Education First and participating funders served up a variety of ideas that matched the group's stated priorities, participants rarely pursued collective funding opportunities. By early 2016, participating funders needed to wrestle with whether it was time to exit or whether this venue still provided enough value for remaining members. We looked carefully at why some funders had dropped out — it turns out most left because of internal staffing or strategy shifts — and we revisited the problems the founding funders said they wanted to work on originally, such as spreading effective teaching practices across a huge state with varying capacity and significant diversity. It was clear all funders still had an interest in the issue, but each had grantmaking priorities they were pursuing on their own.

In the end, we decided that working to find common funding opportunities wasn't the highest value or best use of resources; instead, it was

“resetting” the collaborative opportunity to meet regularly around a learning agenda and coordinate intelligence on state progress. The funders also committed to recruit others to participate in this new structure. Interestingly, because the group stuck together and continued to develop its working relationships and to better understand each other’s priorities, many members of the group are now poised for and confident about jointly investing in a new, potentially significant opportunity to take a fresh look at governance and funding of California’s K–12 school system. The latest evolution illustrates the value of funder collaborations engaging in intentional, candid conversations to explore continuation, reset, or exit; these examinations also create space to step back, reflect, and even surface better opportunities to work together.

Parting Thoughts

Many of us in philanthropy believe that collaboration is a productive avenue for influencing and changing large systems. But creating effective collaborations that lead to action and impact is hard to do and hard to sustain. Some collaborations are not worth pursuing at all — and funders should do more, and save the field a lot of time and effort, to more honestly and more carefully reflect on the costs and benefits of each possible partnership at the front end. But, once committed, we found that looking at the life cycle of these partnerships, with distinguishing stages and distinguishing problems that need to be addressed, helps identify the unique challenges and decisions that need to be tackled along the way, and helps head off predictable areas where the work can get stuck.

Collaborations flounder when funders aren’t clear about goals, metrics, and problems to be solved in the beginning; aren’t clear when grantmaking starts about how decisions will be made and how the collaboration can balance inclusiveness with action; and aren’t clear about when the collaboration has outlived its usefulness. We think that recognizing these sticking points and tackling them explicitly can help more collaborations grow and mature into more powerful forces for social change.

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