

## Top tips for working in partnership from the collaboration of infrastructure organisations

In early 2020, as the Covid-19 pandemic began to hit the UK, an informal group of chief executives from civil society 'infrastructure organisations' came together to share information, pool ideas, offer each other mutual support and discuss the impact on the charity and voluntary sector. These conversations soon focused around the devastating impact on the sector of the pandemic and lockdown – its income, the demand for its services, the people who work or volunteer in the sector and most importantly the people and communities it works with and for.

The initial group coalesced into a 'small group' of 15 CEOs and a 'wider group' of around 60 other CEOs. Meeting virtually twice a week, the 'small group' took a leadership role, working with each other and the 'wider group' as some initial priorities, governance and ways of working emerged and were identified. This led to the launch in March 2020 of the #EveryDayCounts campaign, which unlocked a £750m package for charities from chancellor Rishi Sunak in April. The group then developed the follow up #NeverMoreNeeded campaign, including a five-point financial package aimed at providing much needed further support for the sector.

It hasn't been easy – and who would expect it to be in the circumstances? These are some lessons about collaboration gained from the infrastructure organisations' collaboration and from interviews with members of other successful cross-sector collaborations.

*There have been times when the Infrastructure Collaboration has made me cry, both with laughter and frustration. I am sure there will be times when I will reflect on what it is written here and wince, but I also know that there will also be times when I look upon this collaboration, its achievements and potential with great pride.*

**Rita Chadha, CEO, Small Charities Coalition**

### Relationships are the foundation... and a big part of the benefit

Collaboration is built on personal relationships, so take time to get to know each other. You need to take leap of faith early on – trusting others and being trustworthy – and build from there. Good working relationships enable – and are strengthened by – sharing information and opportunities.

Relationships improve if everyone listens with an open mind, with the intention of understanding each other better rather than just waiting to respond.

It's much easier to work through disagreements and recover from mistakes if there is a strong foundation of trust and a desire to work well together. You will disagree – about what you're seeking to achieve and how to go about it. Discuss how to handle disagreement, and what it means if one of the collaborators doesn't agree with the others.

*Collaboration is difficult and takes time. We're still getting there, especially since there hasn't been a great history of collaboration between infrastructure bodies. It's all about relationships, isn't it? And when for whatever reason we don't have the time to build and sustain these, the collaboration starts to creak at the edges because we don't understand where each other is coming from.*

**Karl Wilding, CEO, NCVO**

*Establishing trust in a group of people who don't initially know each other isn't easy, especially in a virtual environment, but it is essential if group members are to feel comfortable having robust conversations.*

**Vicky Browning, CEO, ACEVO**

*In the circumstances of COVID it was almost impossible, but it would have made a big difference to the collaboration if we'd been able to spend a lot more time getting to know each other individually and on a more personal basis. There are still leaders in the group that I have not yet ever had a one-to-one conversation with, and I feel that I'm missing out on the depth of understanding of their world view, their ways of working, their organisational priorities – and they are missing out on mine.*

**Jane Ide, CEO, NAVCA**

### ... and a big part of the benefit

As you work together, relationships can deepen and lead to other spin-off benefits: sharing intelligence and information; pooling resources and swapping expertise; mutual support and friendship when times are tough; a stronger voice on that things that matter to you.

*In marrying the personal and professional in this collaboration there have been a number of challenges. Understanding other organisational perspectives, accommodating other communication styles and indeed sometimes just even being heard has been extremely challenging. It has required me on many occasions to question myself personally and professionally. But at the same time the intensive almost submersive experience of being part of a new collaboration during a global pandemic has been a source of tremendous comfort and solidarity, precisely because it has also been an opportunity to create a new collective vision for the charitable sector.*

**Rita Chadha, CEO, Small Charities Coalition**

*I have realised that there are few situations so serious that a little humour doesn't help!*

**Peter Lewis, CEO, Chartered Institute of Fundraising**

### Know why you're collaborating, find your common purpose

Collaboration is hard – harder than working alone. So it needs to be worth it: when there's something really important you want to achieve, which you just can't do by yourself. Be clear about the overall purpose of the collaboration, and agree the specifics of the outcomes you are collaborating to achieve.

This may change over time, as you achieve success or realise that you need to take a different approach. So take the time to share your assumptions and ideas about 'what next' and review goals and strategy with your partners.

*I have learned that fundamentally we are all on the same side – it's only usually the approach that differs.*

**Debra Allcock Tyler, CEO, Directory of Social Change**

Understand the different roles, strengths and capacity that the different partners bring. Are some great at research, others have really good community organising capabilities, others have the ear of key decision-makers? Do some need to tread softly, while others can be bolder and louder? Which have special expertise in a particular issue or represent a specific community or interest? Take time to share why each organisation is interested in collaborating to achieve the outcomes.



*There's a real consensus that we need to collaborate and be kind. That doesn't always mean the same thing to all people though!*

*There's a huge amount of good will however. It has reinforced my determination that this group should succeed because it is vital to the sector's future health.*

**Robin Osterley, CEO, Charity Retail**

*The sense of solidarity towards the sector we all serve has been awesome, and helped us through some genuine and deeply held differences in views and approaches.*

**Peter Lewis, CEO, Chartered Institute of Fundraising**

*The sector is way more united and collaborative than it is ever given credit for; there has been a tremendous willingness to find our common purpose and to work together to press government for much needed support.*

**Caron Bradshaw, CEO, Charity Finance Group**

### **Expect stresses and deal with them**

There will be stresses. However good your relationships and however carefully you plan and prepare, you will disagree, misunderstand each other and find it hard to achieve your goals.

So be ready to look at these stresses honestly and deal with them as a team.

Typical stress lines include

- a troubled history between organisations,
- individuals having different communication styles,
- disagreements about goals and tactics,
- differences in organisational culture, such as how fast decisions are made; degrees of agreement (see scale on p7); assumptions about what a deadline is; this list goes on...,
- how to respond to failure,
- how to ensure people get a fair say: women, Black, Asian and minoritised ethnic people, Disabled people, LGBT people and so on,
- Organisations and individuals having different power, resources and capacities,
- The complex accountability of organisations which have staff, members, beneficiaries, and boards or trustees.

Prepare to face these as well as possible by understanding each organisation's limitations, drivers and approaches. Get to know each other as people too: be curious about the personal and organisational issues people may be dealing with beyond the collaboration. Show tolerance rather than jumping to blame if things don't go smoothly.



Pay attention to meeting etiquette. Who puts things on the agenda? Who's dominating and who isn't getting to speak? Who is ignored and who usually has the final say? Do conversations reach conclusions, or run out of time? Do things wander off the point? Different people have different levels of skill in running meetings, and poor meetings waste time and wind people up.

*Collaboration relies on good conversations. Create opportunities to listen, build empathy and understanding of each other's perspectives so that you can spot and resolve areas of disagreement early.*

**Adeela Warley, CEO, CharityComms**

*There have been occasions when some people (including me probably) have talked too much and listened to wait for a space to talk rather than really listened. This has improved hugely as we have got to know each other better and after our structured facilitation sessions.*

**Robin Osterley, CEO, Charity Retail**

*I (re)learned the value of good ground rules and in taking time to understand the perspectives of those you are collaborating with – if you overlook this at the beginning, it may come back to bite you. Equally, once you have built trust and got to know each other better, you can have a deeper conversation about where you are coming from. So it is worth checking in on this throughout the collaboration.*

**Carol Mack, CEO, Association of Charitable Foundations**

### **Develop clear, appropriate governance**

'Governance' covers the processes and structures where decisions are made and accountability sits. These can be complex or simple, but they need to be clear and appropriate for the number of organisations involved, the riskiness of the work being done, and the commitment of time and resources.

The infrastructure organisations' collaboration was from the start led by CEOs, which (in some ways!) made everything else easier.

Things to think about include:

- Structures – what groups, forums, committees or other structures are needed? How do they relate to each other? What is the scope of each one? Can you create and agree formal terms of reference?
- How often should different groups meet?
- Who is providing the secretariat function (calling meetings, circulating any materials or minutes, providing venues or platforms for meetings) and how are other organisations contributing to this?
- Who is chairing each group, and running meetings (not necessarily the same thing)?
- How are decisions made? Which decisions belong to which groups?
- How does a person or organisation get to be in a particular group? How does this change?
- Which groups have a defined lifespan and which continue until dissolved?
- How does the collaboration involve wider stakeholders who aren't collaborators (eg other organisations or interests)? How do collaborators take account of their other accountabilities eg to colleagues, boards / trustees, members (if their organisation is a membership organisation)?
- Agree ground rules for meetings. This group's rules are:  
Assume good intent; listen to understand, not to respond; respond to what's in front of you, not to what you imagine; no interruptions; share the air – take responsibility for helping everyone have time in the conversation; no 'chat' in Zoom or WhatsApp during the session.



## Expect difference

*Traditional notions of charity leadership require you to be focused, decisive and direct, but working in partnership requires you to bend, compromise and give way.*

**Rita Chadha, CEO, Small Charities Coalition**

*I think we should have been much more honest and up front right from the get go about tensions and underlying disagreements. Our attempts to be 'kind' by not challenging or airing disagreements or upset simply allowed underlying issues to fester.*

**Debra Allcock Tyler, CEO, Directory of Social Change**

*It's easy to assume that because we all have the same job title and we all work in the same sector that we will all move at the same pace. We don't – even when we have a really clear sense of shared objectives, some of us jump straight to a conclusion that others take longer to process their way towards. The phrase 'move at the pace of change' has felt very resonant for me in this process – there has to be a continual balancing between cutting to the chase and keeping the collaboration moving together, and I actually think that's very positive.*

**Jane Ide, CEO, NAVCA**

*I wish I had been clearer when I disagreed about what we were doing and why. I think in trying to be collaborative, and supporting something I didn't think was a good idea, in trying to keep the collaboration together I probably ended up doing something that undermined it. So I wish I had found a way of disagreeing better.*

**Karl Wilding, CEO, NCVO**

*When there is a shared vision and an urgent need, people can genuinely put their individual wants aside and focus on the collective good. Through this work, I've seen the absolute best of charity sector leaders. Such a mixed group of leaders who look at things from very different lenses, were able to come together and focus on what was needed for the sector as a whole. As a 'newbie', I felt welcomed, listened to and most importantly I felt like my time was being well spent leaning into this collaboration. Collaboration is hard! It's just so difficult, which is why people tend to avoid it and retreat back into the safety of echo chambers and siloed agendas. We've certainly had our ups and we've had our downs! But people remain committed and motivated to work together for the long term greater good of the VCSE sector.*

**Ndidi Okezie, CEO, UK Youth**



### Sometimes you just need to jump in and give it a go

This collaboration came together very fast, at the start of the UK lockdown in March 2020. The core group of CEOs first got together from a mix of luck and logic – based on existing relationships and a sense of which parts of the sector needed to be invited in. There wasn't time for careful planning or delicate diplomacy. Events were moving fast and the collaboration did too.

It hasn't been perfect but it has been so much better than not collaborating.

*In the circumstances of COVID...  
... in a virtual environment...*

*... a source of tremendous comfort and solidarity...  
... sense of solidarity towards the sector we all serve has been awesome...  
... vital to the sector's future health...  
... a new collective vision for the charitable sector...*

### Keep reflecting and learning

The 15 CEOs in the 'small' group invested time in reflection and review. There were two virtual workshop sessions on consensus, agreement and decisions, which had been a particular stress line in their collaboration.

Because they hadn't had opportunities to get to know each other well early on, everyone contributed a short self-portrait to help the others understand them and their organisation better.

A scale of partnership alignment was developed, which can be used to be more explicit about what kind of agreement or disagreement is being talked about. It's shown below.

The group is continuing to discuss its areas of focus as the external context continues to change rapidly.

*We initially had a very clear objective in relation to securing emergency funding to help the sector continue to deliver services to those most in need at the height of the crisis. But the strength of the collaboration is perhaps best shown by the fact we have invested in continuing the collaboration, responded to new and different challenges and are committed to continuing to work more closely together in the future.*

**Peter Lewis, CEO, Chartered Institute of Fundraising**

*Although our sector is diverse, and that makes it difficult to co-ordinate and unite on issues, with work it is not impossible. This collaboration proves this, and I hope it sets a template for future simplicity and clarity of message from the sector.*

**Paul Reddish, CEO, Volunteering Matters**

These top tips were written by Penny Walker [www.penny-walker.co.uk](http://www.penny-walker.co.uk). Thanks to Lloyds Bank Foundation who funded this review, the 15 CEOs in the 'small group' (Adeela Warley, Ali Harris, Carol Mack, Caron Bradshaw, Debra Allcock Tyler, Jane Ide, Karl Wilding, Kathy Evans, Kunle Olulode, Ndidi Okezie, Paul Reddish, Peter Lewis, Rita Chadha, Robin Osterley, Vicky Browning) to Katie Macdonald for organising diaries, and Ed Mayo and Frank Fletcher for their input. November 2020



# Partnership Alignment Scale

Opposition



Agreement

