

CENTRE
for **social**
IMPACT

THE CHANGE COLLECTION

THE TRAVEL COMPANION:

your guide to working with others for social outcomes



**CENTRE
for SOCIAL
IMPACT**

The Centre for Social Impact believes we need effective models of collaborative social design and implementation to develop innovative solutions to the biggest social challenges today. But not all problems require systemic change and there are different ways of working with others to find solutions to these problems. The Travel Companion is here to help you understand whether and how you can work with others for social outcomes.

Find out more at www.csi.edu.au

THE CHANGE COLLECTION

The purpose of The Change Collection is to build the capacity of everyone working towards a more effective social impact system. The collection provides the foundation knowledge and tools for social change.

THE CHANGE COLLECTION INCLUDES:

- *The Compass: your guide to social impact measurement*
- ***The Travel Companion: your guide to working with others for social outcomes***
- *Orienting Your Journey: an approach for indicator assessment and selection*
- *The Navigator: Your guide to leadership for social purpose*

*Learn more about The Change Collection at:
www.csi.edu.au/changecollection/*

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INTRODUCING THE COLLABORATION HEALTH ASSESSMENT TOOL

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**COLLABORATION
HEALTH**
assessment tool



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**Collaboration
for Impact**

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MACQUARIE

The Centre for Social Impact (CSI) and Collaboration for Impact (CFI) have developed an online diagnostic tool for organisations to assess the 'health' of their collaborative relationships. The Collaborative Health Assessment Tool (CHAT) will help collaborators understand how well they work together now, and in the future as their collaboration matures.

WHY IS THE CHAT IMPORTANT?

Social problems are frequently described as complex, and 'wicked'; issues not clearly defined, usually with various causes, and often affecting multiple organisations, sectors or even regions. At CSI and CFI, we believe that solving these problems requires collaboration across organisations and sectors. To date, organisations have no easy way of assessing the health of their collaborative practices, and consequently, don't really know if the collaboration is going well or not.

HOW WILL CHAT WORK?

CHAT is an evidence-based online diagnostic tool that organisations can use to assess the health of their collaborative relationships. Users follow a series of questions, and the tool helps assess the following components of collaboration:

- Shared goals
- Shared accountability
- Communication flows
- Shared resources
- Systems change as a purpose
- Shared authority
- Whole-system engagement
- Building adaptive capacity

The tool has been produced in consultation with collaborating initiatives around Australia, where we honed the tool through a period of quantitative and qualitative pilot testing.

Users have the option of either interacting with the tool on a one-off basis or by setting up an account with (or without) their collaborators. Both options will generate a series of component scores and an overall "health score" for the collaboration.

Given sufficient numbers, users will be able to see scores for different groups working within the collaboration. Account holders will receive feedback tailored to their health score that can be viewed online or downloaded as a report. Account holders will also be able to track how the health of their collaboration is evolving over time.

THE LONG-TERM VISION

We want this tool to facilitate collaboration so that people can work together more effectively towards a shared goal. Over time, we hope to find out which social issues are being covered by collaborating initiatives, and which issues are missing out. We will also use de-identified data to track the health of Australia's collaborative initiatives over time. Our aim is to identify the key factors that lead to successful collaboration and to develop benchmarks so that collaborations can assess their progress, and ultimately, achieve social impact.

COLLABORATION HEALTH assessment tool

Test Team 1 Team code: 1234

My Surveys My Details Logout

Set up your survey
Set up your groups
Invite your collaborators

MANAGE GROUPS

Group added

Sydney Working Group	Active	UPDATE
Research Team	Active	UPDATE
Group Name		ADD A GROUP

COLLABORATION HEALTH assessment tool

Test Team 1 Team code: 1234

My Surveys My Details Logout

STRUCTURE

SHARED GOAL

Distribution

Category	Value
energy	100
energy	100
energy	100
energy	100
energy	100
energy	100

SHARED RESOURCES

Distribution

Category	Value
energy	100
energy	100
energy	100
energy	100
energy	100
energy	100

SHARED AUTHORITY

Distribution

Category	Value
energy	100
energy	100
energy	100
energy	100
energy	100
energy	100

COLLABORATION HEALTH assessment tool

REGISTER

Register a new Organisation, join an existing organisation, or register as an Individual

New Organisation Existing Organisation Individual

Full Name

Email

Password

Organisation Name

REGISTER

Already Registered?
Login

1. INTRODUCTION



In this chapter you will find your way to:

- *Who this guide is for*
- *How to use the guide*

'There can be hope only for a society which acts as one big family, and not as many separate ones'

- Anwar al-Sadat

WORKING TOGETHER – WHAT IS IT ABOUT AND WHO IS THIS GUIDE FOR?

This is your guide to working together to achieve social purpose. The guide is for everyone working towards the creation of positive social impact in Australia and who wants to know whether and how they might work with others to make a difference.

At the Centre for Social Impact (CSI) we recognise that there is an increasing focus on how people can create social change by working across organisations and even sectors but that navigating the literature, guides, tools and approaches can be overwhelming and challenging. The Travel Companion will help you understand what it entails to work with others and help you along your journey. It explores and explains the key topics, concepts, questions and principles related to working across organisations. If you are interested in understanding whether you need to work with others to achieve your social purpose, the approach to working together that might best suit your needs, and what can help you work together effectively, this guide is for you.

WHAT IT ISN'T

It is not a set of frameworks or a textbook or a jargon-packed treatise.

It is not about how to work together with people inside your organisation. Although this is important, different rules and structures govern relationships within and across organisations. This guide is focused on working together between organisations, within and across sectors.

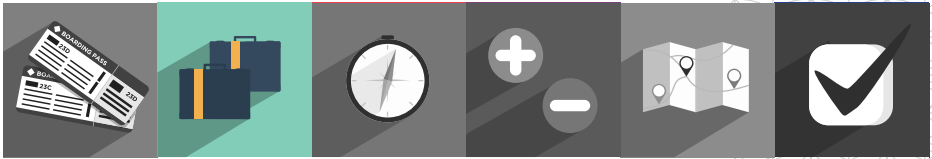
The Travel Companion is not about measuring outcomes. The focus is about putting processes in place around working together to enable the best possibility of achieving those outcomes. If you would like to know more about social impact measurement, please refer to CSI's *The Compass: your guide to social impact measurement*²⁵.

This guide does not look at practical frameworks for working together such as the Collective Impact framework¹ or network arrangements². You can find more information about Collective Impact from resources such as www.collaborationforimpact.com⁴⁶. Instead, this guide explores the overarching ways of working together under which such structures fall.

HOW TO USE THIS GUIDE

The guide is divided into six chapters. Each chapter starts by outlining key learning areas. The sections unpack these areas and introduce and discuss concepts and approaches, and finish with questions to help you consider, "What does this mean for me?" or "What do I do next?"

2. WHAT DOES IT MEAN TO TRAVEL WITH OTHERS TO ACHIEVE SOCIAL OUTCOMES?



In this chapter you will find your way to:

- *Understand the different ways of working together to achieve social outcomes*
- *Recognise the various levels of influences when working together*

'Coming together is a beginning; keeping together is progress; working together is success'

- Henry Ford

Working together can take multiple forms and a range of terms are used interchangeably to describe working together³, for example partnerships, multi-agency working, collaboration, joined-up working, networks, service integration, coordination and cooperation.

In this guide we explore three possibilities for working together across organisations: cooperation, coordination and collaboration. These can be thought of as a continuum of inter-organisational relationships. At one end of the continuum is **cooperation**. It is the least formal type of inter-organisational relationships⁴⁻⁶. Cooperation is followed on the continuum by **coordination**. Coordination still entails relatively informal relationships although to a lesser degree than cooperation⁴. **Collaboration** is the most developed level of working together and sits at the other end of the continuum⁶.

While cooperation, coordination and collaboration exist on a continuum, in practice, organisations do not have to undertake these activities in a step-wise, linear fashion. For example, if you want to collaborate with others it may help if you have a relationship of cooperation or coordination first but it is not essential. Organisations might also cooperate, coordinate and/or collaborate with other organisations at different times or at the same time with different teams to achieve varied goals.

Occasionally, working together may result in moving beyond inter-organisational relationships and involve the merging of organisations or the creation of a new organisation⁷. A recent example in Australia is the 2015 merger between Good Beginnings and Save the Children⁸; however, we do not discuss mergers in this guide.

When working together, there is no one right way. It is important to distinguish between the various ways of working together to be able to identify which arrangement is best suited to particular tasks and contexts⁹. Failure to do so often means that efforts and resources spent on working together do not translate to the desired outcomes⁹.

Working together continuum

Cooperation

Coordination

Collaboration

COOPERATION

Cooperation usually occurs between organisations that operate in the same environment⁵. Environment could refer to the same geographic area which often means an overlap in the population to which organisations cater, or the same issue, but potentially in different locations. Cooperating organisations exchange information on a casual basis and consider each other's goals without giving up their own⁶. Cooperation is often a result of informal relationships between management and/or front-line staff of different organisations and a recognition that such a relationship may foster one's own organisational goals¹⁰. Interactions usually carry low or no costs and the benefits are mainly constrained to individual organisations and their consumers rather than the broader sector or community.

Example 1: Cooperation

John works for an organisation that helps people find employment. Julia is a mother that has just finished a diploma and is currently seeking work. During their first meeting, John suggests that Julia would be a great fit for a job in the adjacent town which is a 30 minute drive away. While the offer looks great, Julia cannot say yes – her car broke down a couple of months ago and she cannot afford to get it fixed. The commute would take her 1.5h on public transport and she has to be back in town at 5:00 every day to pick up her child from day-care. One of John's colleagues, Robyn, recently changed jobs and now works for an organisation that provides low-cost loans to people on low income. John calls Robyn to organise a meeting between Julia and Robyn so that Robyn may apply for a loan to get her car fixed.

COORDINATION

Coordination is usually more formal than cooperation. Communication is more frequent and regular compared to when cooperating. Organisations work together to better achieve their organisational goals, programs or services, with potential benefits accruing to the larger community as a result⁴. The partners working together remain independent, but may share ideas and pool resources to implement activities or programs together to achieve a discrete and agreed goal⁶. There is usually limited accountability between organisations. Coordinating organisations maintain their individual organisation's goals and their independence¹¹.

Example 2: Coordination

Managers from multiple housing providers have noticed that front-line workers spend quite a bit of time assessing the eligibility of potential tenants and redirecting them to other housing providers where appropriate. This reduces the time they have available to work with current tenants. Referred tenants are also often heard complaining that they have to repeat their stories to multiple organisations. The housing providers decide to apply for a government grant together to fund a common intake platform. In addition, the housing providers agree to pool some of their resources to support a coordination team that will direct potential tenants to the organisation(s) most relevant to their needs. Each organisation, however, retains their independence and governance structures.

COLLABORATION

Collaboration is the most developed level of working together. A key characteristic of collaboration is interdependence whereby organisations acknowledge that the success of the work they do is reliant on the actions of other organisations⁶. A collaborative relationship is further defined by trust, power sharing relationships, and open and frequent communication. Collaborative relationships are usually long-term and for collaboration to occur, organisations need to be able to see enough long-term gains to offset potential short-term losses and giving up some autonomy¹².

In contrast to cooperation and coordination where the main goal of working together is for the benefit of individual organisations, the main goal of collaborating organisations is usually to achieve benefits or pursue change beyond the organisational level for society more generally. Due to this outward facing position, collaboration requires deliberate action¹³.

Example 3: Collaboration

There are a variety of organisations from different sectors working in the early childhood space in an urban area. While the agenda of each organisation is focused on different aspects of early childhood – nutrition, after school care, parental support, etc... – they all share the same overarching goal: to improve outcomes for children. The organisations also recognise that they have a better chance at reaching this goal if they work together instead of in silos or in competition with each other. As a result, in addition to their organisational missions, they decide to adopt a common overarching purpose – to improve outcomes for all children in the area – and establish clear roles and responsibilities for each of the organisations to reach their shared goal. They collectively come up with measures of success that indicate when they have achieved this purpose and all agree to be accountable to each other.

RELATIONSHIPS AT DIFFERENT LEVELS

Working together is characterised by interactions at multiple levels. It is important to recognise that inter-organisational relationships are not only shaped by relationships between individuals but also between organisations¹⁴.

For example, consider Richard and David who work in two organisations that have been applying for the same funds over the last few years and thus developed a competitive relationship. While Richard and David might be willing to work together, their respective organisations might not support such an endeavour. The opposite could also be true. The organisations might encourage David and Richard to work together, however, if their relationship is fraught from previous experiences of working together, building an effective inter-organisational relationship will be challenging.

The wider environment in which individuals or organisations are operating can also influence which type of inter-organisational arrangement is implemented, if at all¹⁵. For example, if the policy environment is not supportive of organisations working together, it will be more difficult for individuals or organisations to build inter-organisational relationships. Siloed funding and competitive tendering processes are possible environmental barriers, which may make working together more challenging although not impossible.

KEY NAVIGATION POINTS

There are various ways of working together and we outline three of them in this guide: cooperation, coordination and collaboration. It is important to be able to distinguish between each of them to identify which arrangement is best suited to your needs. When considering working together, and under which inter-organisational arrangement, it is also important to take into account the various levels of influences that may be at play.

Characteristic	Cooperation	Coordination	Collaboration
Relationships	Primarily informal	Range from informal to formal	Interdependent
Shared responsibility	None	Partial	Complete
Communication	Ad-hoc	Project-dependent	Frequent and formal
Who benefits	Individuals or organisations depending on activity	Individuals or organisations with possible benefits for the community	Community with possible benefits for organisations

Example 4: Different ways of working together

Cooperation: Organisations meet bi-annually at a sector conference to share learnings and update each other on the activities of their own organisations.

Coordination: Organisations meet quarterly to discuss their services and possible programs or activities they could run together. The main aim of these meetings is to ensure they are not duplicating work and to identify discrete opportunities to work together.

Collaboration: Organisations meet monthly to discuss progress on their shared goal and make decisions around work programs and next steps in their initiative.

3. TRAVELLING IN THE RIGHT DIRECTION: WHICH APPROACH IS BEST?



In this chapter you will find your way to:

- *Understand how problem and purpose shape the way you should work with others*
- *Work out what type of problem you are trying to solve*
- *Identify the purpose you are trying to achieve*

One of the keys to choosing the right direction when working with others is to think about which route is the best to get you to your destination. In other words, what approach suits your purpose?

In the previous chapter we introduced three different ways of working together: cooperation, coordination and collaboration. Choosing which of these approaches is best for you can be challenging. The approach you should choose depends on the problem you are trying to solve, the purpose you are trying to achieve and the resources you have to achieve your purpose. The importance of resources is discussed in chapter five.

WHAT PROBLEM ARE YOU TRYING TO SOLVE?

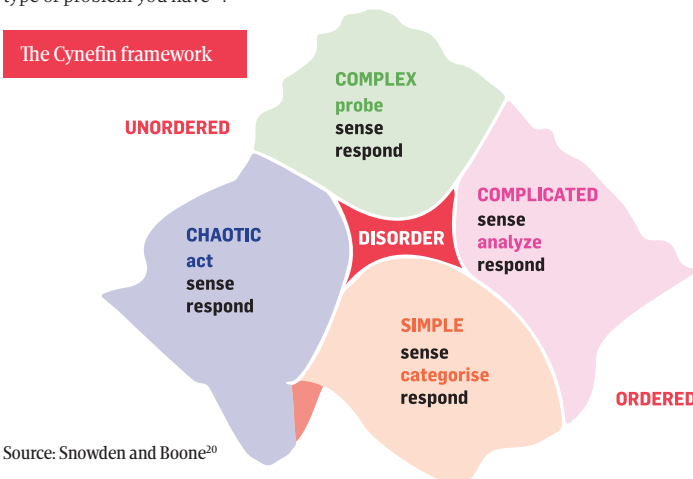
The type of problem you are trying to solve is a key driver determining whether you need to cooperate, coordinate or collaborate with others. The literature talks about simple, complicated and complex problems. Simple and complicated problems can often be solved by organisations either working alone, cooperating or coordinating with others. But complex problems often require a collaborative approach^{9,16,46}.

This is because complex problems, which are sometimes called 'wicked' problems, usually have multiple, hard to identify causes and solutions and are not confined to a single organisation, policy area, sector or region¹⁷. This makes it difficult for individual organisations to address them. While working alone might provide short term solutions, the nature of a complex problem makes it challenging for individual organisations to achieve longer-term, scalable and sustainable change. Such change requires the stakeholders affected by an issue to work together collaboratively^{18,19}.

So how do you know if the problem you are dealing with is simple, complicated or complex? The Cynefin (pronounced ku-nev-in) framework is a useful tool that can help with this.

CYNEFIN FRAMEWORK

The Cynefin framework organises problems into three types: 1) ordered problems where cause-and-effect relationships are identifiable and solutions are known, 2) unordered problems where direct relationships cannot be drawn and issues are dealt with in an emergent manner and 3) disordered problems where you don't know what type of problem you have²⁰.



'We need to develop and disseminate an entirely new paradigm and practice of collaboration that supersedes the traditional silos that have divided governments, philanthropies and private enterprises for decades and replace it with networks of partnerships working together to create a globally prosperous society'

- Simon Mainwaring

Ordered problems can be simple or complicated

- Simple: the problem is fairly well-known and understood; there is clear cause-and-effect, which means that the solution requires minimal or very specific expertise. This could be expertise that is held within one organisation.
- Complicated: aspects of the problem are understood, the questions needed to be answered are known and there is an understanding of how the answers will be found. However, expert knowledge is required to determine the solution and some trial and error is likely to occur before getting the solution right. The expertise for solving complicated problems may come from within an organisation but it is likely that there will be a need to work with other known experts^{20,21}.

Numerous social problems are ordered. For example, the solution to improving access to a city is to improve transport-related infrastructure. Some further investigation can tell us whether a new road, more buses or a light rail may be more adequate, but we may not need to look for an entirely new way of commuting.

When dealing with ordered problems, if the problem cannot be fixed independently, it is often more appropriate to cooperate or coordinate with other organisations than to collaborate. This is because it is very likely that one organisation, at least, already knows the solution but information and/or expertise needs to be shared.

Unordered problems can be complex or chaotic

- Complex: the problem is not well understood and it is difficult to know the right questions to ask. Understanding the problem is challenging and requires experimentation. The solution will usually require multiple stakeholders to work together.
- Chaotic: the issue at hand has gone off the rails and needs to be contained. The solution chosen may not be the best solution but any solution that works is good enough as there is usually no time to search for the right answer²⁰. Once immediate action has been taken, the chaotic problem usually becomes one that is simple, complicated or complex.

Complex or 'wicked' problems are affected by, and affect, multiple stakeholders whose individual actions impact each other. This means there is usually no agreement on what the source of the problem is or what the solution might look like. The resources and skills needed for a long-term solution are also often spread across various stakeholders and are not known or difficult to identify²¹. Because different players each hold a piece of the solution, complex problems require the affected parties to collaborate to achieve something that would not be possible on their own.

Example 5: A wicked problem

Homelessness is often not just about a lack of housing. Many factors may increase a person's risk of homelessness, such as poor mental health, family violence, unemployment and a lack of affordable housing. However, homelessness also increases a person's risk of poor mental and physical health, violence and discrimination. This is not a simple cause-and-effect problem and there is no simple solution. Organisations need to work together to solve the problem. Working alone, a housing provider might be able to provide a homeless person with housing. However, in many cases this is unlikely to be a long-term solution if the tenant also has a very low income, poor physical or mental health and other compounding social problems that are not supported or addressed by other organisations and sectors.

PURPOSE

Establishing what you are trying to achieve through working with other organisations – i.e. your purpose – will also help determine whether you should be cooperating, coordinating or collaborating.

In other words, what, if any, change do you hope to achieve as a result of working with others? Your purpose could sit anywhere on a continuum of change from maintaining the status quo to minimal disruption to current thinking or practices, or systemic change where existing norms, practices and behaviours are challenged²².

Continuum of change

Maintaining status quo

Systemic change

If your purpose is to maintain the status quo, it is likely that you do not need to work with others or may only need to cooperate with others on an informal or ad hoc basis. If you want minimal disruption to current practices, but want to make some improvements to existing systems, it is likely that cooperation or coordination will be sufficient for your purpose. If you are looking to make systemic changes to the system you work in, collaboration is a possible solution.

KEY NAVIGATION POINTS

To summarise, cooperation may be best suited to organisations where business as usual is satisfactory and systemic change is not being pursued. Alternatively, if the focus of working together is more task-oriented and would not generally result in systemic change, then coordination might be more appropriate. Collaboration might be needed if existing practices are no longer considered suitable, either because existing efforts have failed or because organisations realise that they do not have the capacity to reach their objective individually²³.

Task complexity will also influence the choice of approach to working together. More organised models of working together, like collaboration, are better suited to solving complex problems, whereas simple and complicated problems may only require cooperation or coordination.

SO WHAT?

Key questions to consider

- *What model of working together is needed to achieve your particular outcomes?⁷*
- *Does your work together need to focus on a specific task or challenge or does it encompass a range of issues and challenges?¹⁷*
- *Do the prospective partners have a clear purpose for working together i.e. benefits that the partnership is intended to achieve?⁸*
- *Is working together realistic considering the issues that working together is particularly suited to address?¹⁸*
- *Are you willing to consider and carry out organisational change to fit with the shared objectives of the partners?¹⁸*
- *What is the scope of change required and for who?¹⁸*
- *Are you willing to have your organisation exposed to the scrutiny of others?²⁴*
- *Is your organisation prepared to be accountable to other organisations?²⁴*

4. WHAT ARE THE OPPORTUNITIES AND CHALLENGES WHEN TRAVELLING WITH OTHERS?



In this chapter you will find your way to:

- *Identify possible opportunities and rewards when working with others*
- *Understand the risks and challenges of working with others*
- *Weigh up the risks and rewards to decide if working with others is right for you*

'Nobody's going to fix the world for us, but working together, making use of technological innovations and human communities alike, we might just be able to fix it ourselves'

- Jamais Cascio

Working with other organisations seems to be 'on trend' in the social purpose sector. An increasing number of cross-organisational initiatives are being formed both as a result of new statutory requirements and from local efforts to find new ways of delivering better outcomes¹⁸.

But is working together all it's cracked up to be? This chapter looks at some common rewards and opportunities that working together can generate, as well as some of the challenges and risks involved in working with others.

OPPORTUNITIES AND REWARDS WHEN TRAVELLING WITH OTHERS

Working together, instead of in isolation, has a number of potential advantages. We describe some of the main potential rewards and opportunities of working together below.

Increase efficiency and effectiveness

Working together has the potential to increase organisational efficiency. It may achieve more from resources²⁵ by reducing duplication of overheads, processes, systems, tools and/or services across organisations²⁶⁻²⁹. It may also improve effectiveness¹⁸ by allowing organisations and/or individual staff to spend more time focusing on key issues and their expertise. In a climate of dwindling resources, while demand for services keeps increasing, the ability to increase efficiency, while maintaining performance levels, may be a key motivator.

Deliver better services

Conventional service delivery is perceived as fragmented and unresponsive to individual needs³⁰. As a result, there is increasing recognition that improving the service user's experience is an important goal organisations should strive for¹⁸. Organisations working together can agree to link up their services through, for example, a one-entry-point system, systematic referrals, or coordinated delivery of multiple services. Through such mechanisms, working together may not only improve access to services and reduce service gaps but also ensure individuals' needs are addressed in a holistic, integrated manner¹⁸.

Access new resources

Organisations can also decide to work together in order to access or bid for new resources¹⁸. In fact, some funders require organisations to work together so as to be granted financial resources. In parallel, organisations may choose to work together so that they can tap into skills and markets that are not available to them on their own²⁹.

Innovative solutions

By bringing together different points of view, capabilities and knowledge, working together has the possibility of generating innovative solutions to the social problems being addressed or identifying and solving issues at the organisational level^{31, 32}. In addition, by potentially opening up decision-making power to multiple stakeholders and possibly giving voice to traditionally excluded groups, working together can deliver a transformational approach or find innovative solutions to improve services^{9, 33}.

Wider coverage and greater impact

Working together can enable organisations to broaden their reach. For example, to increase service access among hard-to-reach population groups³². As such, increased coverage can translate into broader impact by allowing organisations to provide their services to a wider network of people. Working together can also help strengthen organisational or program legitimacy by demonstrating cross-organisational endorsement. This can further contribute to reaching more people and generating more impact³².

CHALLENGES AND RISKS WHEN TRAVELLING WITH OTHERS

Working across organisations is influenced by challenges and risks that can stem from the new arrangement, as well as from within organisations. We describe some of the main challenges below.

Loss of autonomy, control and flexibility

When working together, organisations may be wary of a loss of autonomy including loss of control, flexibility and recognition²⁹. This can occur when working together is governed by an over-bureaucratic structure²⁷. The need to keep partners on board/engaged may lead to slow and complex decision-making structures¹⁸. Progress may also be impeded if decisions need to be separately ratified by partners in advance¹⁸. There may also be power differentials between agencies, or organisational representatives and the power/rank they bring from their own organisations, which may affect their ability to make decisions¹⁶.

Professional and institutional barriers

Individual staff may feel their professional integrity is challenged through working with others³⁴. This can be a particular challenge when working across disciplines. For example, different types of professionals may have different values, ethics and priorities³⁵. There may also be poor communication between the individuals across organisations due to professional language, turfism, training or high employee turnover³⁴.

Lack of financial resources

Organisations may also be concerned about financial instability²⁹. Working together requires time and resources, including staff, technology and money³⁴. Dedicating resources to working together can be challenging when resources are being cut back²⁷ or there are restraints on budget or staff time²⁹. If there are already severe pressures on staff time, working across organisations may be resisted due to lack of capacity¹⁵. Partner organisations may be unwilling to share resources and information²⁹ and deciding who will provide the resources needed to achieve objectives can be a challenge¹⁸.

Conflicting purpose

Attaining shared purpose may be a challenge if there are multiple motivations among stakeholders²⁷; different definitions of the problem³⁴; conflicting high level objectives¹⁸ or lack of agreement on priorities for action¹⁸. There may also be mission drift²⁹, or shared purpose that is too abstract or high level to have real meaning²⁷. There may be different understandings of meaning and interpretation, e.g. deciding on appropriate size of population group/boundaries²⁷, as well as different understandings of what constitutes success²⁷. A misalignment between the goals of the initiative and those of individual partners²⁹ can also make it difficult to link partners' mainstream activities and budgets with the work of the initiative¹⁸.

Lack of accountability

Those working together need to be wary of the 'dangers of collusion' – this is the risk that partners are so preoccupied with maintaining good relationships that the purpose of working together is side-lined¹⁸. There is also a risk of loss of public accountability³⁶; insufficient attention paid to the conceptualisation and measurement of success, or to the dissemination of information on progress, both across organisations and to the community, can affect the success of the initiative²⁷.

KEY NAVIGATION POINTS

The benefits and challenges of working together that we describe here are not exhaustive. Organisations can and do choose to work together for a variety of reasons that are particular to their situation and environment. The type of benefit, and extent to which organisations experience the various benefits of working together will depend on the purpose of the initiative and thus the type of arrangement chosen. The rewards experienced might also differ across organisations and may not necessarily be equally distributed³⁶.

The challenges associated with working together mean that all forms of working together have a risk of becoming a 'talking shop'¹⁸, where there are lots of meetings and resources dedicated to working together, but very little activity, progress or social change. Like with benefits, risks and challenges may vary in nature and in intensity across organisations.

Organisations considering working together should ask themselves whether these risks can be managed or overcome and if the rewards of working together are higher than the costs. If this is not the case, working together, or the way in which you work together, should be re-evaluated.

SO WHAT?

Key questions to consider

- *Do you really need to work with others?*²⁴
 - » *Does the problem require multiple organisations to work together?*¹⁸
 - » *What are the expected benefits and costs of working together? How will the costs and benefits be measured?*¹⁸
 - » *Will the anticipated benefits outweigh the likely costs (direct and indirect) of working together?*¹⁸
 - » *Could the benefits be achieved in a simpler or more cost-effective way?*¹⁸
- *Do you have the capacity to work together?*
 - » *Is working together realistic considering the opportunities and risks?*¹⁸
 - » *How will working with others change the workload of your staff?*
 - » *Are the partners all willing to devote the necessary resources to make working together a success?*¹⁸
 - » *Is the arrangement permanent, ad hoc or somewhere in between?*¹⁷
 - » *How long do you expect to work with others for?*¹⁷

5. OPTIMISING TRAVEL: PLANNING YOUR ITINERARY



In this chapter you will find your way to:

- *Understand the factors that can facilitate or hinder working together*
- *Understand the importance of each factor for the different ways of working together*

So, you've decided to travel with others. What do you need to ensure this goes as smoothly as possible?

There are a range of things that can support or facilitate working together, or act as a barrier towards working together effectively if they are not in place. We describe some of these below but note that the extent to which they are a facilitator or barrier may depend on whether you are cooperating, coordinating or collaborating and the development stage of your relationship.

SHARED GOAL(S)

Do your potential travel companions want to go to the same destination as you? The **purpose** of working together should be simple, realistic, and under some arrangements, collectively produced²⁷. For most forms of working together, it is also important to ensure all partners are **meaningfully involved** and maintain **active involvement**¹⁸. This may be more likely if the purpose of working together is linked with the partners' mainstream activities and budgets¹⁸. More information about establishing purpose can be found in The Compass: your guide to social impact measurement²⁵.

Cooperation: The informal nature of cooperation means that the goal being pursued by working with others is shared between the individuals working together. For example, even ad-hoc referrals are likely to be driven by a shared goal to help improve a person's outcomes. However, this shared goal does not change or shape organisational goals. The shared goals in cooperating are likely to have pre-dated the working relationship rather than to have been produced together by the partners.

Coordination: Coordinating organisations establish and agree on a common goal for the activity or task they undertake together. This shared objective is constrained to the lifetime and boundaries of the project. Organisations' missions remain unaltered and independent. For example, while organisations might agree to coordinate their efforts to run a joint program, this does not affect the purpose of their respective organisations and the other programs they might run.

Collaboration: Collaboration requires the deliberate creation of a shared goal that is collectively created and agreed upon by all partners. As we described earlier, this is because collaborating organisations seek systemic change which means they need to re-focus their efforts towards a common goal that exceeds organisational purpose. For example, various organisations working in the provision of services for individuals with disabilities (health, transport, employment) can collaborate towards a common goal – improving the lifestyle of individuals with disabilities – which goes above and beyond the organisational mission of improving health, transport access, or employment opportunities. Getting all relevant stakeholders to contribute to setting shared goals helps to ensure ownership of, and commitment to, the initiative.

DEDICATED RESOURCES

The costs of working with others needs to be considered. The costs of working together tend to increase as we move towards the more formal side of the working together continuum. This is because the problems usually tackled by such arrangements are more complex than those addressed through cooperation,

*A sustainable world
means working together
to create prosperity for all.*

- Jacqueline Novogratz

for example. However, some of the costs related to working together are independent of the way in which you decide to work together³⁷. Resources are required not just for service delivery but to support bringing people together²⁷. Dedicated resources, which may include a coordinator, are often required to service and coordinate the processes of working together²⁷. This is more important the more formal the arrangement is. For example, dedicated resources are unlikely to be required for cooperation but may be helpful in coordination and are almost certainly required for effective collaboration. The amount of resources available to an initiative may influence the model of working together that is adopted.

Cooperation: Cooperation does not entail high levels of resources as little change is usually made to the way organisations operate. As a result, dedicated resources are not usually necessary under this arrangement of working together. A coordinator would rarely be required to manage interactions in a cooperative arrangement, since it is often formed on the basis of informal relationships.

Coordination: Coordination is usually task focused and as such some resources are likely to be required to carry out the activity. The need for a coordinator will be dependent on the number of organisations involved in the coordination effort. The higher the number of participants, the more essential it becomes to have someone dedicated to managing relationships, coordinating activities and keeping everyone informed and accountable.

Collaboration: Collaboration requires resources to implement activities and support relationships between organisations involved in the arrangement. Since collaboration typically entails disrupting current practices, it is important that the arrangement has a pool of resources to draw from to fund the various processes required to support the design and implementation of innovative solutions³⁸. In addition, because of collaboration's relational and structural characteristics – such as trust, interdependence, power sharing – and their impact on success, it is often important for collaborative arrangements to have a dedicated coordinator to ensure that participants uphold the values needed for achieving their goal.

TRAVEL COMPANIONS

Identifying appropriate partners to work with is important. Think about whether any key participants are excluded³⁵, what potential partners can contribute towards the shared goal, and what they may expect in return. The complexity of the problem being tackled can affect the number of organisations that need to be involved in order to achieve a successful outcome. Individuals or agencies that do not share some of the same goals may not be the right companions to travel with. If a coordinator is involved, a dynamic understanding of the system will enable him/her to facilitate communication and build and maintain trust among partners³⁴.

It is also important to ensure that individuals and teams involved in the inter-organisational arrangement have boundary-spanning skills and behaviours²⁷. In other words, when deciding who should be involved, choose individuals that have the capacity to work across organisational, sector, discipline and hierarchical boundaries. Where differences in individual and organisational philosophy and policies occur, proactive and ongoing training may alleviate differences³⁴.

Cooperation: When cooperation is based on personal relationships, the choice of travel companions can be seen as accidental or unplanned. Otherwise, because the solution to the problem is usually known when cooperating, the required expertise should make it clear who needs to be involved.

Coordination: Like cooperation, coordinating arrangements may involve personal connections, or individuals and/or organisations holding the relevant skills and knowledge to solve the issue at hand. However, because coordination requires more structure, additional attention needs to be paid to who is involved and whether they have the skills to work with others, in addition to whether they have the expert knowledge required to find and implement a solution.

Collaboration: The type of problems addressed through collaborative efforts mean that multiple stakeholders need to be involved. In fact, complex problems, by nature, are ill-defined and various parties may hold pieces of the solution. Identifying and involving these individuals and/or organisations is critical to the success of the initiative. However, it is not necessary that they are all involved to the same extent all of the time. There might be a core group driving certain efforts and satellite organisations and/or individuals on which the arrangement can draw on as necessary. Having clear roles and responsibilities is critical.

GOVERNANCE: LEADERSHIP AND DECISION-MAKING

Careful management³⁹ and clearly delineated governance structures agreed on by all stakeholders³⁴ are required to work together effectively. For example, this could include agreements on how to run day-to-day activities, well-defined decision-making processes, conflict resolution mechanisms and clear roles and responsibilities for each partner^{40, 41}. Leadership is needed to facilitate and design effective structures and decision-making processes based on trust and reciprocity²⁷.

It is therefore necessary to identify individuals with the right leadership skills, noting that what this looks like may change over time¹⁸. It is also important to recognise that slow and complex decision-making may be inevitable in the early stages of working together to avoid distrust¹⁸. However, in mature arrangements, where trust is established, it may be appropriate to delegate responsibilities for particular projects or to nominate an executive group with authority to make decisions¹⁸.

Cooperation: In cooperative arrangements, leadership and decision-making power remains within individual organisations. While these still matter internally and should be optimised, they do not have a direct effect on cooperative arrangements.

Coordination: Coordination might entail shared leadership and decision-making but this will be constrained to the particular project or task. Organisations maintain their individual leadership and decision-making processes in every other respect.

Collaboration: Shared decision-making power is a cornerstone of collaboration. It is therefore important under this arrangement to make sure that there are no, or few, power imbalances across the represented parties. Shared decision-making does not, however, mean that there needs to be consensus on every issue but rather that each voice has an equal opportunity to be heard. Clear governance structures become very important when collaborating to minimise dissent, uphold accountability and ensure that decisions are made in a timely manner. Strong leadership is needed to support effort towards achieving the shared goal⁴².

TRUST

Trust is a particularly critical element that supports working together²³. Trust may be required at various levels of an inter-organisational arrangement. For example, there may be a need for trust between the front-line staff of different organisations, at higher levels of management, and more general trust between different organisations. Trust matters regardless of the way in which you choose to work together. However, levels of trust at the different layers of the organisation will have varying consequences on the arrangement.

Individuals are more likely to work together when they have already interacted successfully and learned to trust one another²⁹. Trust is developed in multiple ways but particularly through direct experience. When people lack direct experience, for instance if it is the first time they work together, trust can stem from institutional mechanisms³¹ such as contracts or reputation. While this does not necessarily generate trust between individuals, it can produce trust in the organisation's capacity to deliver the necessary results. People can also build trust in potential partners by working with them in other capacities (e.g. interactions through personal or work networks). Building trust can be particularly challenging if the problem the partnership is addressing stems from a legacy of mistrust or conflict between different agencies¹⁶.

Cooperation: When cooperating, trust can either stem from personal relationships or institutional mechanisms. Under this arrangement, trust among the people directly involved (e.g. front-line workers) in the cooperation is an important factor.

Coordination: Higher levels of trust are usually required when coordinating compared to cooperating. This is because the risks are likely to be higher. As coordination needs some alignment of organisational activities, participants may develop trust through the direct experience of working together. Effective coordination will usually rely on trust between front-line workers working together as well as between higher levels of management.

Collaboration: Trust is critical for collaboration. Collaborative relationships carry the most risk as they require the sharing of power and resources and a lack of trust will hinder the participants' willingness to commit the time, resources and effort necessary for success. Because collaborative arrangements seek to achieve systemic change by pursuing a common goal, trust in each other and in the shared purpose needs to be nurtured at all organisational levels.

SO WHAT?

Key questions to consider

- *Is working with others realistic for you given the resources required?*²¹⁸
- *Do the partners all know what role they will play and what resources they will contribute?*²¹⁸
- *What is the number of distinct players involved in the arrangement?*²¹⁷
- *What is the point at which efforts to increase collaboration are simply a waste of resources, without increasing desired outcomes?*⁷
- *Do you have the capability to work together?*
 - » *Do you have existing positive relationships with other organisations?*²³⁵
 - » *Are you open and willing to change?*²²⁴
 - » *Are you able and willing to delegate decision making, if necessary?*²²⁴

6. IS THE TRIP A SUCCESS? ESTABLISHING HOW WELL YOU ARE WORKING TOGETHER



In this chapter you will find your way to:

- *Why evaluation is important*
- *Understand the difference between outcome and process evaluation*
- *Begin thinking about how to evaluate the process of working together*

Evaluation is a good way to monitor how well organisations are working together and to measure progress – i.e. is working together achieving the intended purpose?

As in other sections of the guide, the extent to which evaluation and accountability is required, will depend on the model of working together you choose. Given that cooperation is a relatively informal way of working together, it would be unlikely that you would implement an evaluation to test whether the cooperation was working. Having said that, it would be good practice to check-in regularly with the colleagues or organisations you are cooperating with to discuss whether the arrangement is still sufficient for your purpose, or whether there may be value in establishing a more formal arrangement for working together. The more organised your approach to working together, the more likely it is that evaluation may be beneficial.

Evaluation is integral to most models of working together and should be considered from the start of the arrangement, rather than as an afterthought. This is important because evaluation requires time, resources and capabilities^{25, 27}. It also enables the design of relevant data collection into activities from the outset¹⁸.

Evaluation of working together should have two key components. The first is an outcomes evaluation and the second an evaluation of the process of working together, which may form part of a process evaluation. Evaluating process, not just outcomes, is important to ensure that there is a comprehensive understanding of why outcomes may or may not be achieved, or whether they are achieved as intended. For example, if we focus on outcome data only, we only know whether or not an initiative, program or intervention has had an effect. We would not understand *why* the initiative works (or doesn't).

To use the travel analogy, if we were evaluating the outcome of a holiday or trip, we might ask whether the trip was good or bad (the outcome) but without a process evaluation, we wouldn't know why the trip was good or bad, what aspects of the trip made it good or bad or whether any of these aspects were in our control to change. For example, if the trip was bad because it took too long to get to the destination, was it because we chose a flight with several stop-overs in order to get the cheapest travel fare, because there was a fault with the plane that led to a diversion and delay while the plane was fixed, or was it simply because we chose to travel to a destination that was far away. A process evaluation can help determine this.

In deciding what and how to evaluate outcomes, it is important to think about how you will know if the shared goals have been achieved; which outcomes can be measured numerically; and how other outcomes might be assessed¹⁸. More information about evaluating outcomes and measuring impact can be found in CSI's *The Compass: your guide to social impact measurement*²⁵.

As well as considering outcomes, an evaluation of working together should assess⁴³:

- The relationships and processes that enable working together;
- The level of participation and engagement of those working together;
- How well the structures and processes involved in working together allow participants to contribute to and influence the work and outcomes.

It is important to ensure evaluation includes the voice of all stakeholders³⁴ – if measures or indicators can only be influenced by some partners, others may feel marginalised¹⁸.

However, diverse factors that contribute to working together effectively are not easy to measure. Changes in outcomes may occur but go undetected because they are difficult to evaluate or the wrong questions were asked¹⁶.

EVALUATING THE PROCESS OF WORKING TOGETHER

There are many different methods than can be applied to evaluate the process of working together. Each of the methods and approaches has its advantages and disadvantages and provide a different perspective. The method you choose is likely to depend on a wide range of factors including the stage you are at in working together, the purpose of evaluation, and what information and evidence users and stakeholders require. Different evaluation questions require different methods. Examples can be found in CST's *The Compass: your guide to social impact measurement*²⁵.

A process evaluation is likely to include both a quantitative and qualitative element. For example, a survey approach could be used to assess and summarise partnership members' perspectives on working together. A more in-depth study, using interviews with key stakeholders for example, might explore why participants hold particular viewpoints. Both surveys and interviews may involve asking respondents about a range of issues such as:

- Presence and effectiveness of various elements of working together, for example, planning and implementation, leadership, resources, communication, trust, opportunities for involvement, progress and outcomes;
- How they would assess their commitment to working with others;
- What keeps participants engaged in working together⁴⁴.

Two other common methods used for evaluating the process of working together are participatory evaluation and social network analysis.

Participatory evaluation requires those working together to actively self-reflect on actions and behaviours. It will also uncover the critical stages and events involved in working together⁴³. Partners reflect on issues such as how far strategies and understandings of the context are shared; how far information, ideas and resources have been distributed; how partners have been able to work creatively; how connected members are to others involved in working together. This could take place via a questionnaire but lends itself well to more qualitative approaches such as interviews and recorded observations (e.g. reflective notes from participants).

Social network analysis is a tool that maps and measures relationships in terms of their strength, frequency and quality. It can be used to reveal and specify the relationships involved in working together. Social network analysis can provide graphical maps of these relationships as well as identifying whether there have been changes in the nature and types of exchanges between partners working together over time. Social network analysis can reveal, for example, flows of information, communication and advice; resources; and whether relationships are formed on a formal or informal basis³⁵. For examples of how social network analysis have been used, see the work of Pope and Lewis⁴⁵ and Keast and Mandell⁶.

SO WHAT?

Key questions to consider

The list below details possible questions to include in your evaluation of how well you are working together:

(Source: ARACY factsheet 10: Evaluating collaborations⁴³)

Relationships and processes

- *Are there good relationships between members?*
- *What is the trust level?*
- *Is time spent on members getting to know each other and their problems/limitations?*
- *Do members feel a strong or weak bond, or commitment, to each other?*
- *Are there processes in place to enable these bonds?*
- *Is relationship building (internal and external) an accepted part of the work program?*
- *Do members communicate openly and frequently?*
- *Do members have a sense of commitment to working together as well as their own organisation?*
- *What are the power relations? Is power shared or does it appear to rest with specific members of the collaboration?*
- *Are there mechanisms to resolve conflict?*
- *Is there a culture of learning?*

Participation level

- *Do all members participate in terms of decision-making and resource provision?*
- *Are there barriers to participation?*
- *Are there processes in place to check 'engagement level'?*
- *Are people participating as much as they can/wish?*

Structure and control

- *Is the way working together is set up appropriate for the aims?*
- *Is the structure too tight (strangling), too loose (lacks cohesion) or just right (facilitates action)?*
- *Where/how are most decisions made? Democratically or centralised?*
- *Is there support for working together by key actors outside the initiative, for example among parent organisations, powerful stakeholders, respected people in the community?*



GOOD LUCK ON YOUR JOURNEY

Whether you are considering working with others to achieve social impact or have already started on this journey, we hope that the CSI Travel Companion has delivered some useful signposts to help you on your way. While collaboration provides one pathway to tackling today's social challenges, it is not the only way of working with others, particularly if the problem you are addressing does not require systemic change. The Travel Companion has hopefully provided you with guidance on how to choose the most appropriate model of working together for your purpose, problem and available resources; highlighted some of the opportunities and challenges associated with working with others; outlined factors to look out for along the way; and provided tips for assessing how well your journey is progressing.

Working with others is not an easy task but in many situations we can achieve more together than we can alone. If you decide to travel with others, whichever approach you choose, we wish you luck on your journey!

PHRASE BOOK:

THE LOCAL LANGUAGE

Collaboration: Is a highly developed and formal way of working with others. It involves working towards a collectively produced, shared goal to solve a complex problem. It usually involves organisations letting go of some autonomy and combining resources in pursuit of the common goal (see chapter 2 for more).

Complex problem: A complex problem is an issue with many possible cause-and-effect pathways and numerous people and parts to the system. The behaviour of one part will affect the behaviour of others and there may be intended and unintended consequences.

Cooperation: This is an informal way of working with others. It entails individuals and/or organisations exchanging knowledge and/or skills to support their organisational goals (see chapter 2 for more).

Coordination: This is a way of working with others where organisations come together to implement discrete activities or services to achieve a mutually beneficial goal (see chapter 2 for more).

Evaluation: Systematic inquiry to inform decision-making and improve programs. "Systematic" implies that the evaluation asks critical questions, collects appropriate information, and analyses and interprets the information for a specific use and purpose.

Impact: The longer-term social, economic, and/or environmental outcomes (effects or consequences) of a program. They may be positive, negative or neutral; intended or unintended.

Inter-organisation relationships: Relationships *across* or *between different* organisations, within or across sectors.

Intra-organisation relationships: Relationships *within* an organisation, for example between individuals or teams.

Measure: In this guide we define 'to measure' as "assess[ing] the importance, effect or value of (something)".

Outcome: An outcome can be both the results/effects expected by implementing a program/initiative/ strategy and the changes that occur in attitudes, values, behaviours or conditions. Changes can be immediate, intermediate or long term.

Qualitative data: Seeks to understand how the world is understood, interpreted and experienced by individuals, groups and organisations (usually through the eyes of people being studied and in natural settings). It unpacks the 'why', is often richly descriptive, flexible, relative and subjective. Qualitative data is usually text or narrative.

Quantitative data: Seeks to explain something by using numerical data: how many, much, often, change etc. It is highly structured and based on theory/evidence and is usually objective, but can also capture subjective responses (e.g. attitudes and feelings). It provides findings that can often be generalised and are conducted in artificial settings.

Stakeholders: Any group or individual who can affect, or is affected by, an organisation or its activities. Also, any individual or group that can help define value propositions for the organisation.

Wicked problem: Another way of describing a complex problem. See *complex problem* above.

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