

S.H. COWELL FOUNDATION

## Sharing Responsibility to Achieve Collective Goals



Grantee Leadership Convening  
May 25-27, 2011  
Chaminade, Santa Cruz, California

## S.H. COWELL FOUNDATION

### Mission

The mission of the S.H. Cowell Foundation is to improve the quality of life of children living in poverty in Northern and Central California by providing support that strengthens families and communities.

### Vision

We envision towns and neighborhoods across Northern and Central California where people across all sectors - residents, public and non-profit service providers, educators and civic leaders - strive together to build and sustain strong communities that support low-income children and their families and expand their life opportunities.

### Strategy

The S.H. Cowell Foundation's grantmaking is rooted in a strategy that is both **place-based** and **complementary** in design.

Our approach is **place-based**. Cowell looks for low-income communities in Northern and Central California where there is a readiness and commitment to embrace social change. Community members (that is to say, both individuals *and* institutions) must possess a clear desire to make a lasting difference for kids and families in the neighborhoods where they live, learn, work and play.

Our approach is **complementary**. Cowell makes clusters of grants within specific communities to support schools, youth development organizations, family resource centers, affordable housing, and other critical community needs. We fund projects, programs and initiatives designed to touch the lives of community members on multiple levels simultaneously (at home, school, work and play) in order to increase the likelihood of lasting community change.

We also support the development of individuals to better serve their communities through leadership development grants and a bi-annual leadership convening. The convening brings together leaders from the Northern California and Central Valley communities where the Foundation is engaged in place-based grantmaking.





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Never doubt that a  
small group of  
thoughtful, committed  
citizens can change the  
world.

*Margaret Mead*



## **Introduction**

On May 25-27, 2011, at the Chaminade Retreat Center in Santa Cruz, California, 100 Cowell grantees and community leaders came together and exchanged ideas about the practices and challenges of sharing responsibility to achieve collective goals.

This leadership convening featured opportunities to learn about collaborative strategies that can help leaders achieve results for their communities, organizations and schools. During our two and a half days together, we shared illustrative stories and discussed strategies for collaboration that we hope will continue to inspire self-reflection and action. The convening was designed to be highly interactive and used innovative technology that allowed us to produce this wisdom book.

## *Goals*

The goals of the 2011 leadership convening were to:

- Learn successful collaboration strategies.
- Build more effective teams within schools, organizations and communities.
- Feel more inspired and empowered to do the work of strengthening communities.
- Strengthen relationships among organizations in one's own and other communities where Cowell is engaged in grantmaking.

## *What Happened*

The convening opened with an interactive experience facilitated by One World Music that encouraged collaboration among participants. On Day 2, participants responded to presentations from Kelley Gulley, Marc Johnson, and Leslie Medine, three Cowell grantees who shared distinctive perspectives on the convening theme. Using CoVision collaborative technology, participants explored, refined, and added to the presenters' ideas. A "theme team" worked to harvest and coalesce the wisdom of the participants, and distilled it down for reflection and use.

## *What You'll See*

There was a lot of wisdom in the room, and we hope we captured a slice of it here that you'll find useful. We captured high-level themes across the different conversations, and added quotes that exemplified each theme. As you read this, also consider, "What's not here?" We recognize how hard shared responsibility to achieve collective goals actually is, and how much skill, capacity building, and personal



development it takes to really do this work. Thank you for all the work you do that enriches your communities and makes our world better to live in.



Music and rhythm find their way  
into the secret places of the soul.

- Plato

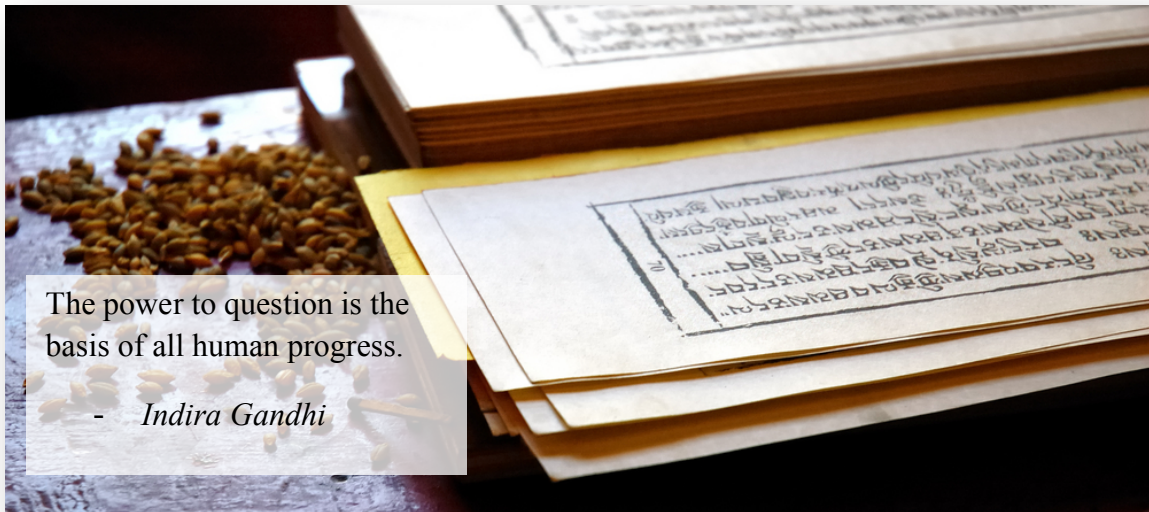
### Insights from One World Music

One World Music (OWM) began with a high-energy opening performance. In OWM's view "music is the oldest form of collaboration" and therefore provides the perfect medium to explore the convening's theme: "Sharing Responsibility to Achieve Collective Goals." OWM then led participants through carefully framed exercises that drew connections between music and collaboration. With the help of egg shakers, rocks and musical tubes, participants explored topics including listening, leadership, "getting on the same page", interdependence, chaos and improvisation. Employing what was learned, small groups then composed and performed their own music and later discussed the skills required to work in a collective. Finally, OWM closed with an upbeat improvised, participatory vocal piece. The following key themes emerged from the group's input.

#### Key Themes:

- It was fun, and it's important to have fun. It's good to laugh, and fun builds relationships. If a group isn't laughing, something is wrong.
  - "A sense of humor is critical as multiple things are coming at you with change."
- People were willing to play outside their comfort zones and to let go. It's also part of a process – that it's normal to have discomfort upfront and there's a process to getting to the fun place.
  - "Everyone felt apprehensive at first but by the end we were engaged and comfortable with being vulnerable."
  - "Very skeptical at first, but as it progressed, really enjoyed and got a lot out of it."

- Titles disappeared and leaders emerged organically. Sometimes there's opportunity where it doesn't look like there is structure.
  - "Many people become uncomfortable when there's not an identified leader, but that allows non-traditional leaders to step forward."
- Anything can be a doorway, and raise metaphors for life.
  - "In passing rocks, am I just going through the motions?"
  - "The big lesson is to ask ourselves how often we are present to ourselves and others in our work with our teams, especially when faced with stress?"
- Having a diversity of talents supported creative work.
  - "Thinking about music as a metaphor for collaboration was great! Improvisation and richness of diversity [arises when] people aren't all doing the same thing."
  - "If we encourage everyone to share their unique gifts, working together, we become stronger and better. We make beautiful music."
- Different modes of engagement and interaction support activities and relationships.
  - "You need more right-brained activities to continue to refresh your left-brain."
  - "The music helped us to become more present to who we are in our mind, body, and spirit."
  - "There is more than one way to communicate and to listen."
- There is power in listening at multiple levels and in multiple modes.
  - "You have to listen and appreciate diversity, especially the voices way out on the edge."
- Repetition can add and deepen what we do. Sometimes the simplest things are the key. It doesn't mean we don't innovate, but there is room for deepening and integrating our practice.
  - "Getting in the groove is what makes it a democratic process where everyone can participate....community rituals."



## Delving into Theme

**Kelley D. Gulley** began by challenging participants to really think about the meaning of the theme “Sharing Responsibility to Achieve Collective Goals”, because there are several assumptions built into the language of it. In Kelley’s view, “collective goals” can’t be achieved without developing authentic relationships over time. For her, authentic is defined as “being real, genuine, bona fide”, and implies that one is “fully trustworthy”, operating in complete truth and wholly transparent. She shared that relationships are the state of being interrelated, and can be described as a specific bond or kinship. Kelley learned from Dr. Omowale Satterwhite, the founder of the National Community Development Institute (NCDI), that how you work with people is more important than what you do; that without enduring relationships, there can be no achievement of collective goals. It takes deciding that the collective outcome is more important than the individual agenda, and is more important than holding tight to the “old baggage” of the past.

NCDI’s mission is to build capacity for social change in communities of color and other marginalized communities in a culturally-based way. The NCDI framework is based on working from, with, in, and for the community. NCDI works *from* the community by listening and learning, works *with* the community to co-design the change strategy, works *in* the community to facilitate action and learning, and works *for* the community to bring about social change.



Kelley reminded us that this is hard work, and must begin with having an open heart and an open mind. Opening begins with listening. Kelley described listening as both an attitude and a place. For that reason, the self that one brings to the work matters. It must be a self willing to challenge all of one's personal assumptions and biases from a place of humility.

#### Key Themes:

- There are necessary qualities of relationship that are core to sharing responsibility to achieve collective goals. These include respect, humility, trust, transparency, vulnerability, and authenticity.
  - “You have to be open and willing to change to achieve collective goals.”
- There are also key skills, such as listening openly, deeply, broadly. The ability to build trust is also key.
  - “Listen open-heartedly.”
- A metaphor that resonated was the crockpot analogy – that relationships take “time over time”. They take time, intention, commitment, and flexibility.
- There is a way of entering, working with, and being in relationship with communities, beyond the individual. This takes being part of community, doing things with rather than to. You also need to build on the assets and talents that people bring, that exist in the community.
  - “Bridge the distance between yourself and the community.”
  - “We’re doing things *with* people in communities rather than *to* people in communities.”
  - “Value the real experts.”



- “When shifting from giving my expertise to sharing our expertise.” This goes with, and really owning, “I am not an expert, I bring expertise.”
  - “You have to be on the ground to know the landscape.”
- The attitude or self that one brings is important.
  - Have to genuinely care ... this is not just a job
  - “Caring and passion for the goal are crucial to aligning all parties around the collective goal.”
  - “Check your ego at the door.”
- There are elephants in the room, like power.
  - “Where does power lie? How to equalize it and recognize what people bring? Need a willingness to put aside positional power or at least acknowledge it exists.”
  - “Who is making decisions on the money? Is it individual or collective? Where does the rubber hit the road?”
  - “There are all kinds of competing agendas.”
- Common purpose seems to be a requisite necessity, and has some complexity to it.
  - “How do ‘collective goals’ account for marginalized voices? Does collective mean the majority?”

Listening:

It’s an attitude and a place.



- “In order to have collective goals, there needs to be openness and willingness to change.”
- “Need to move past “what’s in it for me” attitude to set the collective goal.”

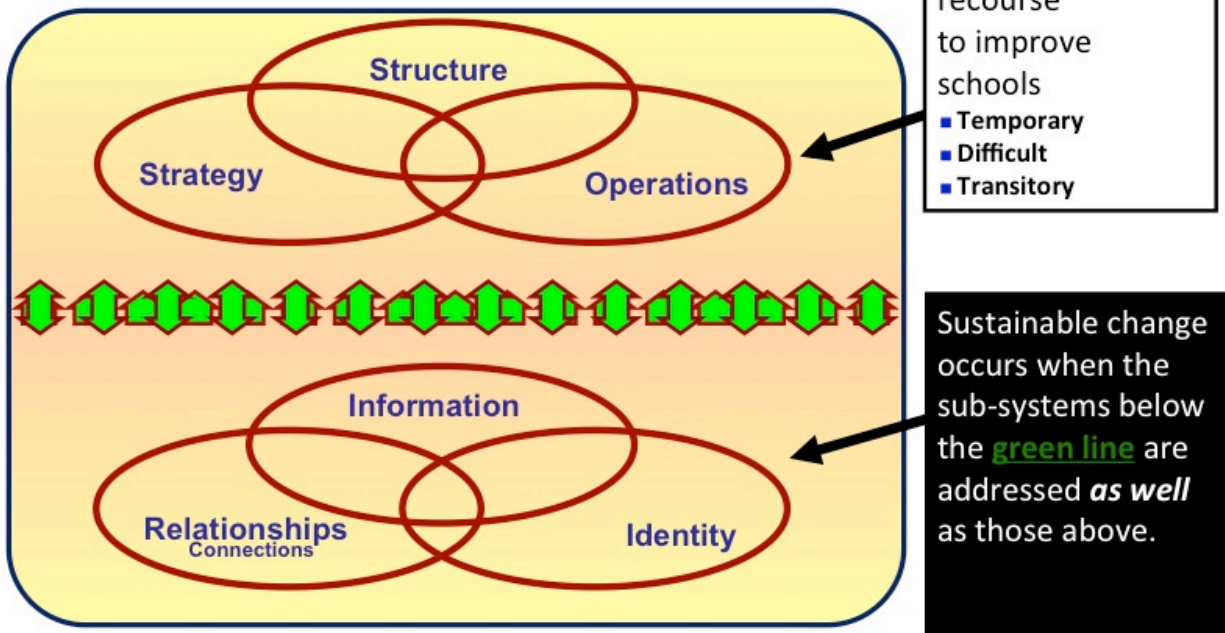
## Building Systems and Sustaining Habits that Support Collaboration

**Marc Johnson** began by speaking to the importance of story, because each child has his or her story and these stories compel us to ask the questions about why we do what we do. Sometimes, Marc reminded us, the stories we hold in mind, or that children hold about themselves, can actually stand in the way of learning. He then shared a systems perspective, adapted from the work of Meg Wheatley, to understand where collaborations and relationships form a foundation for sustainable change. In this perspective, there are six systems: strategy, structure, operations, information, relationships, and identity. Usually, in an organization such as a school district, the first recourse to resolve issues lies among the first three systems – strategy, structure, and operations. But Marc asserted that sustainable change happens when the second three systems – information, relationships, and identity – are addressed; unfortunately, these are the ones usually neglected.



## A Systems View for PLCs

Adapted from Margaret Wheatley's Work



Marc explained that his leadership as superintendent is guided by three principles: hope is not a strategy; don't blame the kids; and it's about student learning. It takes teams, guided by these principles, to make a school district work for children. Marc defined teams as groups of people working interdependently toward a common goal for which they are mutually accountable. Accountability has to be a reciprocal process; "for every expectation I have of you to perform, I have an equal responsibility to provide you with the capacity to meet that expectation." The capacity to achieve common goals has to be built and practiced every day through the habits of working together and learning by doing, and by instituting mechanisms that exist for the purpose of sustaining these habits.

Key Themes:

- Capacity building takes commitment and time. It needs to be ongoing, like painting the Golden Gate Bridge.
  - "Build capacity for home-grown leadership."
  - "Figure out what your capacity is and what you need and how to go about building it."
  - "Integrate a system that continually builds capacity."
- Time for collaboration has to be built-in, regular, consistent, valued.
  - "Structure regular, sacred, shared time for collaboration."

- A lot of things go into creating a culture of learning and collaboration, including being explicit about values, identity and mission, systems of accountability, etc.
  - “Learning must be a focus in the culture: accountability, learning and shared ownership.”
  - “Build organizational culture, identity, and shared values.”
  - “Building a culture of accountability can only really occur when people feel a sense of ownership.”
- Learning needs to be institutionalized, beginning with the acknowledgement that we’re all learners, and also reinforced.
  - “Acknowledging that we’re all learners and building the structure that reinforces and even incentivizes that learning for adults.”
  - “There needs to be a commitment to continual learning and assessment – to what’s not working and what’s not.”
  - “Have systemic, collaborative meetings that become the culture.”
  - “Celebrating the small successes keeps the momentum going.”
- Leadership includes walking the walk, holding others accountable, and the concept of servant leadership.
  - “Look for/be open to collaborating outside your ‘normal’.”
  - “Leaders need to model behaviors and values.”
- Inclusiveness needs to be built into process.
  - “Consistent check-ins to make sure all parties are represented.”
  - “Make a complete list of stakeholders and ensure representation.”



“Why do we do  
what we do?”



## Playing to Win



**Leslie Medine** began by recounting an experience that grabbed her attention through its novelty and insight. A teenager taught her that “in order to do great things in the world, you must be known and know others.” Leslie’s experience made her realize that real work, especially difficult, collaborative work, begins with an urgent or compelling question. For her current work in the McPherson neighborhood in Napa, it began with “What really matters?” and “How can we change outcomes for our children and young people?” The effort to address these questions actually helped create a new reality that defined a neighborhood whose residents came together on behalf of their 2,000 children.





The new reality of the neighborhood then drove other questions, such as, “If I am going to partner with others, what will I give or bring as a contributor?” and “Do we have the neighborhood partners who want to work together on behalf of our children?” She also talked about creating a Democracy Zone, where people L.E.A.D.: Listen to what matters to others, Express your thoughts and feelings, Act on behalf of children and Decide together.

Leslie reflected that the hardest part of this process emerged as questions became increasingly personal: “What do I really know about the other neighborhood partners?”, “What am I willing to reveal about myself?”, “What does it mean to commit, to say “yes” to each other?” Ultimately, Leslie discovered that these questions led to accountability.

She explained that in her experience, accountability takes “staying in the fear, the tension, the not-knowing, and the potential disappointment all the way towards the fleeting moments of victory, exhilaration and breakthrough. In light of that experiences comes still another question, “Who wants to sign up for that?!” The interdependent work of holding each other accountable is hard. So, why do it? We do it because that’s what it takes to play to win. Leslie explained that in the field of life, there are multiple arenas one can choose to play in. One can choose not to play, to just play, play not to lose (where many people live), or play to win. Playing to win is about being known, knowing others, risking failure, and being committed to interdependence. One *plays to win* by being committed to the excellence of others.



Key Themes:

- It's worth asking the question, "What does playing-to-win mean?"
  - "Playing to win is putting yourself in a vulnerable situation."
  - Some people noted that even though they thought they would be rated by others as "playing-to-win", they rated themselves as "playing-not-to-lose", again highlighting disconfirming perceptions.
  - "Playing-to-win means that you take risks and excel in what you have said you will do."
  - "Playing to win is putting the community interest before your own."
  - "In an effective partnership, you together pull each other up to 'play to win' and are greater as a whole than individually (rather than pulling down to play-not-to-lose)."
  - "Playing to win does not mean you win, or that it's about winning, but a style of playing. Part of playing to win is risking spectacular failure." This is where some tension came up because people may be willing to take that risk personally, but an organization failing spectacularly isn't an option.
    - "Sometimes the consequences of failure loom larger than the benefits of success in our decision-making."

- It is really important to be open to both giving and receiving disconfirming feedback. Self-awareness begins with feedback and a willingness to honestly look at ourselves.
  - “Feedback and reflection are necessities.”
  - “Giving disconfirming feedback to colleagues takes courage.” (Receiving it also takes courage.)
  - “Trust and support is essential to receive feedback and make changes.”
  - “Disconfirming information is critical in order to make positive changes in yourself.”
  - “We didn’t get in this game to win a popularity contest. Sometimes adults need to face discomfort in order to help students be successful.”
  - “Why do we sometimes play-to-win versus play-not-to-lose? Fear, fatigue, workload, and doubt?”
- There is tension between assumed expectations of a leader and ability to be vulnerable and authentic.
  - “For leadership, you have to fake it until you make it.”
  - “We think there is room for a leader who is vulnerable and acknowledges the places of ‘not-knowing’.”

## The Messiness of Collaboration



After we listened to the morning conversations, we realized that we talked about what makes sharing responsibility to achieve collective goals successful, but not what gets in the way, what's messy about it, the darker side of people's experiences. In order to create safety for real conversations, it seemed important to at least raise the question of, "What's hard about collaborations? What's messy about them?"

- Maybe we have to reframe the way we think about time.
  - "Non-profits don't have the luxury of the kind of time."
  - "Do we have time not to collaborate?" (Can we afford not to?)
  - "It seems like it will take more time to collaborate than do it alone, however, that may not be the case in the long run."
  - "Sometimes there's just not enough time to build relationships. There's no grocery store to wander in – there's just a vending machine to grab something quickly from!"
  - "There's a tension around taking the time to be innovative, take risks, build collaborations etc., and doing all the things that you always do to keep the lights on."
- There's a human factor that gets in the way.
  - "Different personalities, passive-aggressive behavior, people have their personal dramas."



- “It’s messy because too many times, people are not getting real at the table. There are too many parking lot conversations, no real authenticity.”
- Some degree of self-interest needs to be there, and self-interest can also get in the way when there’s a preoccupation with one’s share of the pie.
- Ego issues frequently seem to get in the way of collaboration and sharing responsibility for achieving collective goals.
  - “Some partners are unable to let go of their own agendas.”
- Communication is fraught with its own challenges, even with good intentions.
  - “It’s hard when people leave the table and may message the situation differently.”
  - “It’s hard to know what’s happening to people between meetings, so disconnects happen even after good work together.”
  - “Communication cycles are time intensive and arduous.”
  - “When a group gets to the place to have a real talk, even when it’s scary and can be hurtful, afterwards people appreciate it.”
- Competition and scarcity for resources (clients, money, recognition) also contribute to the messiness of collaboration.
  - “Some partners are locked into their agenda that might be defined by their funders.”
  - “Dealing with fear around losing resources gets in the way.”
  - “Self-interest, competition for money, and distrust are the big forces in the way of collaboration.”
  - “It’s hard when a collaborative starts talking about money. It’s difficult to build a shared budget because there is no openness about money. Money is so ‘private’.”
  - “The fair division of responsibility and the fear of not getting credit are real issues.”
- Old history gets in the way.
  - “We tried working with these partners before and it was a disaster.”
  - “Bad experiences with collaboration can get in the way of future attempts.”
- Even if you have the shared vision and values, differences in beliefs about processes get in the way.
  - “Despite the common goal, many partners have different approaches or methodologies.”
  - “Just because you have the same goal, may not have the same values or process to get there.”
- Part of what gets messy is changes in leadership.
  - “Players change and relationships get lost when that happens.”
  - “Even when it all comes together, sometimes leadership changes result in new players who do not share the collaboration ethic, and the effectiveness of collaboration is diminished.”
  - “Even with funders, once a leader or driver changes, you must start over. Most times we don’t inherit funding relationships. How do we sustain relationships with funders?”



## What's the Difference that Makes the Difference?



In this last section, we wondered, given all that we had heard, what were the most important things we needed to add that would make the difference? We also included meta-themes across all the earlier conversations in this segment.

- Personal and collective clarity on the word “collaboration.”
  - There is a continuum from partnership to collaboration and working together to achieve a collective goal can occur anywhere in that spectrum.
  - “Partners have to define what collaboration means to different ethnicities, groups, and communities.”
  - “Infusing your work with a strength-based, optimistic view of the world that celebrates and acts on how together we can create more than any of us could separately.”
- Knowing when collaboration is the right strategy, knowing when to do it, knowing who to do it with.

- “The discussion about collaboration as it relates to our theme assumes that collaboration is the only way to get to shared responsibility for achieving collective goals. This is not the case, there are many ways up the mountain.”
- “We have to be intentional about the people we bring into the room.”
- “The danger of collaboration is oversimplifying and idealizing collaboration and being in it just for collaboration’s sake.”
- “An opt out option for members of a collaborative is necessary – forced collaborative often don’t work.”
- “Go through the ‘dating’ phase before entering into marriage.”
- Alignment around purpose and roles is a necessary up-front step *and* process.
  - “Putting what is going to improve the community at the center of the conversation, not what our organizations need.”
  - “Delegating roles to help ensure that members of the team can keep their eye on the ball.”
  - “Joint vision that is aligned with building strong communities is necessary.”
  - “Back to basics – define collaboration and key goals and values.”
- Trust, trust, trust and the quality of the relationship matters.
  - “Trust, trusting ourselves, trusting the process, trusting others...”
- Styles and characteristics of leaders matter.
  - “We think there is room for a leader who is vulnerable and acknowledges the places of ‘not-knowing’.”
  - The dichotomy between playing all out and being tired, and where is it okay to be human.
- The interdependence required for the group effort, different perspectives, and expertise must be core. Success of whole really dependent on interdependence.
  - “Interdependence - my effective work is dependent on your effective work, being in it together.”
- Framing failure.
  - “Not looking at failure as a negative experience but as a moment for growth.”

## Questions for the Road

Given the conversations, what's the next question?

What are the questions that come up for you?

What went unsaid? (What goes unsaid in the larger group conversations? What was raised in informal conversations?)

What are the questions you want to explore in your communities?







## Planning Team

### *Chat Team*

**Kelley D. Gulley** is the President & CEO of the National Community Development Institute (NCDI), headquartered in Oakland. NCDI is a training and technical assistance organization that uses culturally-based approaches to build capacity for social change in communities of color and other marginalized communities. She has experience in management, policy development, administration, training, facilitation and writing and editing. Her expertise is promoting collaborative partnerships, visioning, long-range planning and creating resource development opportunities for organizations that serve low-income communities.

**Marc Johnson** has been involved in public education in the Central Valley for over 35 years as a teacher, principal and district administrator. He is currently the Superintendent of the Sanger Unified School District, which serves a high minority, high poverty, and high English learner population. In 2011, Marc was recognized this year as the National Superintendent of the Year by the American Association of School Administrators.

**Leslie Medine** is the founder and Executive Director of On The Move (OTM), a non-profit organization that promotes vibrant communities by building and sustaining effective leaders and healthy organizations in the public sector. Leslie brings over 35 years of experience working within the non-profit sector as a community organizer and educator. She has served as the founder of several community-based organizations and schools.

### *Theme Team*

**John Esterle** is the Executive Director and a board trustee of The Whitman Institut, a private foundation whose mission is to promote a more peaceful and sustainable world through respectful dialogue, critical thinking and vibrant citizen engagement. John serves the board of Philanthropy for Active Civic Engagement and he co-chairs Northern California Grantmaker's (NCG) Organizational Effectiveness and Professional Development Committee.

**Deborah Meehan** is the Founder and Executive Director of the Leadership Learning Community (LLC), which includes more than 1200 leadership development practitioners, funders, scholars and researchers. She has received several awards and recognition for her work, including a Kellogg National Leadership Fellowship and a Salzburg Fellowship, and serves as a board member for the International Leadership Association and the Blue Cross Blue Shield Foundation of MN.

**Judi Powell** is the Director of Programs at Northern California Grantmakers. She is responsible for overseeing the development of grantmaker education programs and collaborative philanthropy enterprises, and helps develop strategy for the organization. She previously served as Senior Program Officer at Peninsula Community Foundation, and was Senior Associate with the philanthropic consulting firm Blueprint Research & Design.



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**Gayle Karen Young** is an organization development consultant who applies a focused, systemic approach for sustained changes aligned to corporate objectives. Her focus areas include leadership development, facilitation, change management, instructional design, strategic communications, building high performance teams, and personal and organizational transformation. She specializes in adult development and helping leaders evolve and adapt strategically to increasingly complex external environments. She currently serves on the board of Spark, a non-profit organization dedicated to building communities of young, global citizens invested in changing patterns of inequality that affect women globally. Gayle is also a facilitator for the Stanford Graduate School of Business. Phone: 415.310.8416 / Email: [gaylekaren@gmail.com](mailto:gaylekaren@gmail.com)

**CoVision** is a pioneer in the field of group engagement technology consulting. Over 18 years, CoVision has developed several generations of tools and processes for maximizing participant engagement. CoVision has supported the facilitation of thousands of interactive meetings and online processes both in the US and worldwide, including The World Economic Forum, The Clinton Global Initiative, and numerous Fortune 500 senior leadership meetings. Lenny Lind, founder of CoVision, is co-author of the best-selling *Facilitator's Guide to Participatory Decision-Making*. Phone: (415) 563-2020 / Email: [lind@covision.com](mailto:lind@covision.com)

**One World Music** is a leading-edge experiential learning company that uses the performing arts to engage, enlighten, and transform organizations of all kinds, one beat at a time. It gets teams in synch, aligns people with strategy, inspires leadership, and catalyzes change. One World Music is a recognized pioneer in the application of performing arts concepts to organizational development. Its customized services, for groups from 15 to 5,000 people, can be applied to boost creativity, collaboration, and success in a number of contexts. Phone: (510) 653.6038 / Email: [gary@oneworldmusic.com](mailto:gary@oneworldmusic.com)

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