LEADING CHANGE IN SHARED SPACES

How the Colorado Collaborative for Nonprofits integrated six missions and sixty-five staff to create a shared workspace and hub for the nonprofit sector.

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COLORADO COLLABORATIVE FOR NONPROFITS

In 2010 Colorado Collaborative for Nonprofits was chosen as one of the first cohorts of the Denver Shared Space Project. Cohort members – Colorado Nonprofit Association, Colorado Nonprofit Development Center, Community Resource Center, Community Shares of Colorado, and Metro Volunteers – met regularly for two years to identify shared space needs and potential for program and mission collaboration.

Based on those discussions the cohort located a building with open office space on the second floor and a first floor training center. The organizations moved into the space in November of 2013 and began a change management initiative to establish a shared organizational culture for the new professional community.

Colorado Collaborative for Nonprofits is a vital hub where people and ideas connect.

SHARED SPACE

There is a persistent call for nonprofit organizations to reduce overhead and duplication of efforts through sharing administrative and programming costs. A growing number of nonprofits are exploring co-location as a viable option for greater collaboration and cost savings.

Guidance can be found within a vibrant network of nonprofit professionals and consultants working to develop shared spaces for nonprofits including the Denver Shared Space Project.

CHANGE MANAGEMENT

Organizational change impacts performance; unmanaged change can lead to dramatic drops in productivity. Good planning on narrowing the performance gap associated with change can achieve performance gains of 25% or more.

When it became clear the Colorado Collaborative for Nonprofits would come to fruition, the executive leaders of the five organizations began to discuss how to lead the change management process of integrating 65+ staff members and interns in the new shared space.

With support from Colorado foundations, The Collaborative engaged an organizational anthropologist to assist in our change management planning and process. This included an assessment of each organization’s historic culture, identifying strengths and potential conflicts in style, and recommendations for creating a distinct organizational culture for the new space.

KEY TAKEAWAYS

- Organizational culture is not just a matter of the personalities in the room and how they communicate. Culture is influenced by mission, programming, structure, values, history, strategic priorities, and leadership style.

- Effective change management in a shared space requires executive leadership and consistent modeling of desired organizational culture norms.

- Along with written values, organizations have informal and behavioral norms that are disrupted when sharing space. Because the norms are often unspoken, staff may have a hard time identifying, articulating, and addressing the cause of conflict.

- It is important to recognize and reward staff members who contribute to establishing and strengthening organizational culture within the shared space.

- Staff members can play a leadership role in change management and creating organizational culture if executive leadership provides a clear and concise framework for contributions (e.g., vision, goals, timeframe, budget, and measures of success)
The Daniels Executive MBA (EMBA) at the University of Denver is an internationally ranked, highly selective, academic program designed for the mid-to-senior level professional. Students come to Daniels College of Business with a desire for fresh perspective, new networks, academic challenge, and increased confidence. Strategically focused and integrated in approach, the EMBA classroom is a dynamic environment of leaders from a wide array of backgrounds and industries. The EMBA program is designed for executives seeking to strengthen their business skills, expand their leadership abilities, and broaden their perspectives. A significant component of the Executive MBA program deals with issues of values and corporate social responsibility, including environmental ethics and sustainable development.

The Social Capital Project (SCP) is a graduation requirement conducted in teams over the 18 months of the program and designed to reflect the values of the Daniels College of Business. Students are encouraged to identify issues they are passionate about and consider strategic contributions they can make to the cause applying skills and insights gained through the EMBA program. A special emphasis is placed on the sustainability of SCPs to encourage long-term impact on the organization or cause.

As a Social Capital Project, Alyssa Kopf elected to provide leadership support to the change management initiative to integrate the office cultures of Colorado Nonprofit Association, Colorado Nonprofit Development Center, Community Resource Center, Community Shares of Colorado, and Metro Volunteers in the shared space Colorado Collaborative for Nonprofits. The key deliverable for the Social Capital Project is this written report prepared by Alyssa Kopf and classmates Josh Pinkert and James Cowan on the change management process made available to other nonprofits considering a shared space initiative.
DENVER SHARED SPACES

The Denver Shared Space Project (DSSP) is a nationally recognized public-private partnership that promotes best-practices in the creation and operation of shared space centers in Denver. Started in 2009 by the Denver Office of Strategic Partnerships, Piton Foundation, and Urban Land Conservancy, this collaborative effort has grown to include partners from various City agencies, commercial real estate and development, and nonprofits serving the community.

As an innovative collaborative dedicated to providing technical assistance and targeted support to the Denver shared space community, DSSP connects organizations with shared space resources and works to influence policy within city government.

DSSP’s programming works to:

- Provide web-based tools for resources and support in finding and filling space
- Facilitate learning and networking opportunities for shared spaces in Denver
- Fund targeted consulting to help create and optimize shared space centers
- Connect governments, businesses, and funders to support shared space efforts

Twenty-four emerging and existing shared space centers were involved in DSSP’s programming in 2012. These centers represent more than 200 tenants that include private nonprofit and for-profit organizations as well partnerships or tenants from the public sector.

2012 SNAPSHOT OF ACHIEVEMENTS

- Opened the new Colorado Collaborative for Nonprofits, a vital hub of support for the nonprofit sector across Colorado
- Passed first broad-based policy around government support of shared space in the nation
- Enhanced development and operations of 8 shared spaces housing over 80 nonprofit tenants through individual and group consulting support.
- Provided an ongoing forum for resources, support, and sharing of best practices amongst 24 shared spaces representing nearly 200 organizations
- Increased traffic at www.DenverSharedSpaces.org by 67% since 2011, providing access to resources and tools to find or list available space.
- Initiated outreach efforts with the commercial real estate community providing educational and networking opportunities.
COHORT SELECTION

In 2010 the Denver Shared Space Project invited self-selected cohorts of nonprofits to apply for technical assistance to explore the feasibility of creating new multi-tenant nonprofit centers in Denver. Through a competitive application process, DSSP selected a cohort of five nonprofits focused on capacity building and support for nonprofit organizations. DSSP provided the cohort with funding to engage consultants as well as dedicating staff time to participating in the exploration and planning process.

PLANNING PROCESS

Throughout 2011 and into 2012, cohort members met regularly to identify shared office needs and a vision for planned program collaboration. Working with specialist consultants, the cohort completed:

- Organizational readiness assessments
- Financial assessments and budgeting
- Creative space planning to achieve operational and collaborative goals
- Real estate guidance and negotiation
- Legal review of contracts and leases
- Change management analysis and planning
- A timeline for long-term strategic planning on shared goals

SPACE BUILD-OUT

Based on those discussions the cohort located an office at 789 Sherman that would meet its space needs and allow for enhanced collaboration. Offices are on the second floor with the first floor housing a training center with meeting rooms and a large training room. The new space serves as a vital hub for capacity-building and professional support for Colorado nonprofits.

EXECUTIVE LEADERSHIP

The five executive leaders of the organizations began meeting weekly in May of 2012 to facilitate communication as the project’s pace and complexity increased. Along with overseeing contract negotiation, project management of the build-out, and fundraising for the project, the executives recognized the importance of managing the integration of the staff members of the cohort in the new space.
COHORT PARTICIPANTS

COLORADO NONPROFIT ASSOCIATION

Established in 1986, Colorado Nonprofit Association exists to strengthen nonprofits because they are crucial to a better quality of life in Colorado. Every day Colorado Nonprofit Association educates and informs nonprofits about new ideas, best practices, and pressing public policies because with that knowledge they can achieve greater impact on Colorado communities. Colorado Nonprofit Association is the collective voice of Colorado’s nonprofit sector and a statewide membership organization helping nonprofits fulfill their mission to make Colorado a better place to live.

COLORADO NONPROFIT DEVELOPMENT CENTER

Since 2000, the Colorado Nonprofit Development Center (CNDC) has been a nonprofit partner for innovation, efficiency and accountability. CNDC is the only nonprofit in the region providing comprehensive fiscal sponsorship and organizational management services to emerging, transitioning, and established community organizations. Our sophisticated back office support allows nonprofit leaders to focus their energy on making an impact in our community.

COMMUNITY RESOURCE CENTER

Community Resource Center (CRC) provides training, technical assistance and consultation to nonprofits and community-based organizations in Colorado and across the country. CRC empowers nonprofits to fulfill their missions by building capacity, strengthening skills, and providing strategies for success. CRC serves as a convener of communities to expand resources and stimulate change.
COMMUNITY SHARES OF COLORADO

Community Shares
Colorado's Community Giving Fund

Community Shares is Colorado’s community giving fund. Community Shares was founded in 1986 when eight nonprofit organizations joined together to change the face of corporate philanthropy. They established Community Shares to highlight nonprofits rarely featured in high profile workplace giving campaigns. Community Shares focuses on inclusive philanthropy by representing a vital and vibrant portfolio of nonprofit members and welcoming all donors with no minimum donation requirements. Since inception, this Colorado-grown community fund has raised $24 million for local nonprofit organizations with an average donor gift of $1 a day.

METRO VOLUNTEERS

Metro Volunteers is Denver’s leading source for volunteer engagement, volunteer leadership training, and volunteer advocacy. Metro Volunteers is a national thought leader in volunteerism and are recognized for our innovative approaches. Metro Volunteers makes volunteerism smarter by empowering individuals and organizations with knowledge and skills to create more effective, engaging, and impactful volunteering. They offer a wide range of innovative programs, tools, and resources to turn volunteer passion into powerful impact.
VISION FOR COLLECTIVE IMPACT

TOWN SQUARE FOR THE NONPROFIT SECTOR
• Serve as the hub for knowledge, resources, and innovation for the sector
• Provide a physical home – complimented with a virtual reach – for nonprofit collaboration in Colorado
• Convene Coloradans from all sectors and communities to discuss problems, propose solutions, and lead change

RESEARCH, POLICY, AND ISSUES ADVOCACY FOR THE SECTOR
• Leverage our networks and affiliations to raise the profile of key issues facing the nonprofit sector
• Provide a leadership role in advocacy by gathering information, serving as a knowledge base, and activating our constituencies
• Highlight the essential contributions of the nonprofit sector to quality of life and economic development in Colorado

HUMAN CAPITAL AND WORKFORCE DEVELOPMENT
• Assist in development and awareness of dynamic career opportunities in the Colorado nonprofit sector
• Increase capacity of nonprofits to find, focus, and keep talented employees
• Encourage transformative use of volunteers in high impact roles

NEW OPERATING AND LEADERSHIP STRUCTURES FOR NONPROFITS
• Provide capacity support for nonprofits to take ideas to scale
• Respond to a sector that is increasingly diverse in organizational size, complexity, locality, and flexibility
• Technically assist nonprofits as they explore collaboration, the sharing of back-end resources, and restructuring of organizations to maximize mission impact

RESOURCE DEVELOPMENT IN A CHANGING ENVIRONMENT
• Provide current information and future forecasting on the shifts in revenue resources for nonprofits and trends in giving
• Train nonprofits to perform accurate financial forecasting and develop realistic resource growth plans
• Prepare nonprofits for a world where social good is not always funded – or led – within the structure of 501(c)(3) organizations
### PARTICIPANT CENSUS JUNE 2013

<table>
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<tr>
<th></th>
<th>Colorado Nonprofit Association</th>
<th>Colorado Nonprofit Insurance Agency</th>
<th>Colorado Nonprofit Development Center</th>
<th>Community Resource Center</th>
<th>Community Shares of Colorado</th>
<th>Metro Volunteers</th>
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<td>14</td>
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<td>$956,000</td>
<td>$1,062,900</td>
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<td>14</td>
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<td>27</td>
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<tr>
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<td>14</td>
<td>12</td>
<td>21</td>
<td>11</td>
<td>10</td>
<td>10</td>
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<td>1,399</td>
<td>1,182</td>
<td>1,512</td>
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Along with strategic and tactical program planning for staff collaboration, the executive leaders of the cohort recognized the human capital considerations of change management would be essential to success. Without a thoughtful plan for introducing and integrating staff members into the new environment, the cohort would suffer great gaps in performance for the project as a whole and as within individual organizations. The change management initiative was developed to manage the performance gap following major organizational change.

By launching a formal change management program, the executives signaled recognition of the level of disruption caused by moving and co-locating. Each organization and each individual would be adapting to an array of changes in their work environment. Types of changes included:

- Transitioning from a small team (7-15 people) to a cohort of 60+ staff members
- Transitioning from being enclosed in a demised suite to an open office layout shared by five organizations
- Increased walk-in traffic and unfamiliar guests in workspace
- Moving individuals from private office space into cubicle workspace
- Sharing common space such as break rooms, meeting space, and training rooms
- New phone systems and office equipment
- New geographic area and neighborhood amenities
- New security systems and shared safety responsibilities
ORGANIZATIONAL CULTURE

The second element to address in the leading change initiative was establishing a distinct organizational culture for the shared space. Parr (2012) writes, “Culture is a balanced blend of human psychology, attitudes, actions, and beliefs that combined create either pleasure or pain, serious momentum or miserable stagnation. A strong culture flourishes with a clear set of values and norms that actively guide the way a company operates. Employees are actively and passionately engaged in the business, operating from a sense of confidence and empowerment.”

Parr emphasizes the importance of living values and recommends, “Don’t just list your company’s values in PowerPoints; bring them to life in people, products, spaces, at events, and in communication.” Watkins (2013) refers to Aristotle’s statement, “We are what we repeatedly do. Excellence, then, is not an act, but a habit.” Moving into a new space would require a diverse set of individuals to not only bring the values to life but to adopt new daily habits aligned with the agreed-to new organizational culture.

STAFFING AND LEADERSHIP

While executive leadership planned to dedicate a significant portion of time to leading this process, they recognized the importance of bringing in change management experts to assist with planning. The executives projected two phases of planning and management over the first 12-15 months in the new space. The first phase would be focused on aligning five distinct organizational cultures, values, people, and behaviors. The second phase would be a strategic planning session focused on creating a 2-3 year work plan to explore shared training programming. The executives felt a successful introduction and integration of staff should precede collaboration work and program planning.
CHANGE MANAGEMENT RESEARCH

Definitions of organizational culture vary widely depending on the perspective of the definer. The difficulty in developing a consistent definition is that culture manifests in different ways for every group. Culture is a product of the people involved and the environment in which they exist and can be seen in the group’s artifacts, values, and underlying assumptions. (Schein, 1990) These three things make up the system of how a group understands their culture and how it guides interactions and group behavior.

When disparate groups are suddenly combined underneath one roof, conflict develops as the groups seek to preserve their values, assumptions, and artifacts. Change Management is developing systems that openly address these conflicts and outline routes to conciliation. Developing and implementing these systems is the role of senior management. 70% of change efforts fail due to reasons including lack executive leader alignment, failure to engage the correct key team members or engaging them too late, or an organizational resistance to change that is not appropriately addressed. “Change usually fails when leaders fail to manage the people side of the equation” (Interaction Associates, 2008)

8 STEPS TO LEADING CHANGE

Effectively managing the change process begins with an organized and well thought out approach that addresses the particular structure of the groups involved. In his bestselling book, “Leading Change”, John Kotter outlines an 8 step approach to managing the change process in a way that creates lasting change. (ContXt Corporation, 2013)

1. Establish Urgency
2. Create the Guiding Team
3. Develop a Vision and Strategy
4. Communicate for Understanding and Buy-In
5. Empower Others to Act
6. Produce Short-Term Wins
7. Consolidate Gains and Produce More Change
8. Create a New Culture

Kotter’s process focuses on developing an appropriate vision and strategy that is communicated effectively to the organization by a leadership team that is dedicated to the creating successful change. When the vision and strategy are effectively communicated, alignment increases throughout the organization increasing the chances for success.
FROM MINDTOOLS: KOTTER’S 8-STEP CHANGE MODEL
IMPLEMENTING CHANGE POWERFULLY AND SUCCESSFULLY”

STEP 1: CREATE URGENCY
What you can do:
- Identify potential threats, and develop scenarios showing what could happen in the future.
- Examine opportunities that should be, or could be, exploited.
- Start honest discussions, and give dynamic and convincing reasons to get people talking and thinking.
- Request support from customers, outside stakeholders and industry people to strengthen your argument.

STEP 2: FORM A POWERFUL COALITION
What you can do:
- Identify the true leaders in your organization.
- Ask for an emotional commitment from these key people.
- Work on team building within your change coalition.
- Check your team for weak areas, and ensure that you have a good mix of people from different departments and different levels within your company.

STEP 3: CREATE A VISION FOR CHANGE
What you can do:
- Determine the values that are central to the change.
- Develop a short summary (one or two sentences) that captures what you “see” as the future of your organization.
- Create a strategy to execute that vision.
- Ensure that your change coalition can describe the vision in five minutes or less.
- Practice your “vision speech” often.

STEP 4: COMMUNICATE THE VISION
What you can do:
- Talk often about your change vision.
- Openly and honestly address peoples’ concerns and anxieties.
- Apply your vision to all aspects of operations – from training to performance reviews. Tie everything back to the vision.
- Lead by example.

STEP 5: REMOVE OBSTACLES
What you can do:
- Identify, or hire, change leaders whose main roles are to deliver the change.
- Look at your organizational structure, job descriptions, and performance and compensation systems to ensure they’re in line with your vision.
- Recognize and reward people for making change happen.
- Identify people who are resisting the change, and help them see what’s needed.
- Take action to quickly remove barriers (human or otherwise).
STEP 6: CREATE SHORT-TERM WINS
What you can do:
- Look for sure-fire projects that you can implement without help from any strong critics of the change.
- Don’t choose early targets that are expensive. You want to be able to justify the investment in each project.
- Thoroughly analyze the potential pros and cons of your targets. If you don’t succeed with an early goal, it can hurt your entire change initiative.
- Reward the people who help you meet the targets.

STEP 7: BUILD ON THE CHANGE
What you can do:
- After every win, analyze what went right and what needs improving.
- Set goals to continue building on the momentum you’ve achieved.
- Learn about kaizen, the idea of continuous improvement.
- Keep ideas fresh by bringing in new change agents and leaders for your change coalition.

STEP 8: ANCHOR THE CHANGES IN CORPORATE CULTURE
What you can do:
- Talk about progress every chance you get. Tell success stories about the change process, and repeat other stories that you hear.
- Include the change ideals and values when hiring and training new staff.
- Publicly recognize key members of your original change coalition, and make sure the rest of the staff – new and old – remembers their contributions.
- Create plans to replace key leaders of change as they move on. This will help ensure that their legacy is not lost or forgotten.
CASE STUDY: CHANGE COMES AT A COST


ABSTRACT

In 2008, a group of Chicago’s oldest and largest social service agencies formed the Back Office Cooperative (BOC), which a McKinsey & Company study estimated could save as much as $100 million annually through joint purchasing and shared administrative functions. Although the cooperative has produced impressive financial savings, greater efficiency has come at a cultural cost.

CASE STUDY QUESTIONS

- How important is efficiency to a successful nonprofit enterprise?
- How does BOC’s cooperative structure affect the dynamics of the collaboration?
- Why shouldn’t all nonprofits be part of a BOC-like shared service platform?

KEY TAKEAWAYS

- “The deep organizational transformation required to substantially and sustainably enhance efficiency often involves tough choices and tradeoffs that can profoundly affect an organization’s future, its relationships with employees, volunteers, and clients, and its identity and standing within its local community” (p. 67).
- Relentless pursuit of efficiency can compromise a nonprofit’s identity and mission
- Collaboration requires participants to sacrifice “varying degrees of independence, uniqueness, and aspects of their corporate cultures” (p. 71)
- When seeking cost savings, it is recommended to identify “overlapping support functions, such as finance, accounting, information technologies, human resources, and purchasing” (p. 66)
- High expectations of cost-savings by funders can add pressure and tension to cooperative management decisions
- Substantial cost savings requires significant scope and scale of shared services
INITIAL GOALS

Initial goals were established using the Resilience Report: 10 Principles of Change Management.

GOAL 1: ESTABLISH UNIFIED EXECUTIVE LEADERSHIP

Objective 1A: Executive leaders commit to identifying and supporting the vision, values, and culture desired for the Colorado Center for Nonprofits.

- “Because change is inherently unsettling for people at all levels of an organization, when it is on the horizon, all eyes will turn to the CEO and the leadership team for strength, support, and direction.”
- “Executive teams that work well together are best positioned for success. They are aligned and committed to the direction of change, understand the culture and behavior changes to be implemented, and can model those changes as individuals.”

Objective 1B: Each leader will assess the gaps in alignment between their respective organization’s current culture, values, and norms and the desired vision for the shared space.

- “Company culture is an amalgam of shared history, explicit values and beliefs, and common attitudes and behaviors.”
- “The change-management approach should be fully integrated into program design and decision-making, both informing and enabling strategic direction. It should be based on a realistic assessment of the organization’s history, readiness and capacity to change.”

Objective 1C: The executive leaders will reach consensus on a case for change that is delivered consistently authentically.

- “The articulation of a formal case for change and the creation of a written values statement are invaluable opportunities to create or compel leadership-team alignment.”

GOAL 2: INITIATE STAFF OWNERSHIP OF THE CHANGE MANAGEMENT PROCESS

Objective 2A: Form a Leading Change Team – consisting of executive leaders and key staff from each organization – to create a plan and process for managing culture change.

- “A formal approach for managing change – beginning with the leadership team and then engaging key stakeholders and leaders – should be developed early, and adapted often as change moves through the organization.”

Objective 2B: Executive leaders will ensure the staff members involved in leading change will have dedicated time in their workload for this important project and meaningful incentive for zealous participation.

- “Ownership is often best created by involving people in identifying problems and crafting solutions.”
Objective 2C: The leading change team will identify additional levels of change leaders to ensure 100% reach to staff members.
• “Change efforts must include plans for identifying leaders throughout the company and pushing responsibility for design and implementation down, so that change ‘cascades’ through the organization.”

GOAL 3: ENGAGE ALL STAFF MEMBERS AND KEY STAKEHOLDERS IN CULTURE CHANGE.

Objective 3A: Executive leaders and the Leading Change Team will consistently communicate the need, vision, and benefit of culture change to all staff members and key stakeholders.
• “Too often, change leaders make the mistake of believing that others understand the issues, feel the need to change, and see the new direction as clearly as they do. The best change programs reinforce core messages through regular, timely advice that is both inspirational and practicable.”

Objective 3B: While executing the plan of the Leading Change Team, leadership will carefully monitor changes in culture and behaviors and explicitly assess and address the perception of staff members.
• “Thorough cultural diagnostics can assess organizational readiness to change, bring major problems to the surface, identify conflicts, and define factors the can recognize and influence sources of leadership and resistance.”

Objective 3C: Executive leadership will commit to individual meetings with each staff member to discuss how they are adjusting to culture change. Along with plans and process, leaders must acknowledge the personal reaction to change and motivate staff members to align with the new vision.
• “Change is both an institutional journey and a very personal one.”

TIMELINE

• Organizational Anthropologist (September-October 2012)
• Day 1 Integration (November 5, 2012)
• Welcome Breakfast (November 12, 2012)
• Organizational Culture Report (December 5, 2012)
• Leading Change Priorities (January-December 2013)
• Collaborative Open House (February 27, 2013)
• Social Contract (July 17, 2013)
• Strategic Planning (July-December 2013)
ORGANIZATIONAL ANTHROPOLOGIST

The executive team prepared a summary of the project that was used to prospect foundations for funding and distributed to consultants in the form of a request for proposal (RFP).

PHASE 1: CULTURAL ANTHROPOLOGY AND SOCIAL CONTRACT
The shared space project will combine five formerly independent organizations into a single, cohesive office culture. Each of the five entities has its own rich history, organization culture, values, and norms. Engaging a cultural anthropologist will document our individual cultures so we can make intentional efforts to honor the diversity and differences in our respective organizations. The cultural anthropologist will assist in facilitating the cultural implications of the migration into a physically integrated organization. Following this assessment, we would work as a team to create a Social Contract for the staff of the shared space project ratifying our mutually selected rules of engagement as a new community.

### PHASE 1 BUDGET

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</table>

PHASE 2: CHANGE MANAGEMENT FACILITATIVE CONSULTANT
Change management of the integration of organizations will be a multi-year process and an extreme priority in the first six months of integration (September 2012 – February 2013). Attached is a draft of a very broad change management plan. The project will greatly benefit from hiring change management consultants to develop and help execute the integration of our organizations. The executives will rely on outside sources with subject matter expertise and commit to executing our important responsibilities to enhance this transition. At the same time, we believe hiring a facilitative consultant will allow the executive leadership of the five organizations to take an active role in leading change.

### PHASE 2 BUDGET

<table>
<thead>
<tr>
<th>Service</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Management Facilitative Consultant</td>
<td>$20,000</td>
</tr>
<tr>
<td>Staff Convening and Integration Events</td>
<td>$10,000</td>
</tr>
<tr>
<td>Executive Staff Support</td>
<td>$50,000</td>
</tr>
<tr>
<td><strong>TOTAL PHASE 2 BUDGET</strong></td>
<td><strong>$80,000</strong></td>
</tr>
</tbody>
</table>
PROPOSED SCOPE OF WORK FOR ORGANIZATIONAL CULTURE ASSESSMENT

1. Individual semi-structured interviews (up to 1 hour each) with CEOs from each organization.

2. Group interviews to identify key elements of the current organizational culture
   
   - Five groups divided by organization--Since the number of staff members at each organization is less than 15, the group interview format is manageable and offers the opportunity for staff to build on each other’s ideas and perspectives.
   - 60-90 minutes each group.

3. Attend meetings as appropriate when at the office for interviews.

4. General observation in the office.

5. Summary report based on the interviews and observations.

6. Workshop/staff retreat to present findings from preliminary report and develop an action plan for building the desired culture

7. Final report with recommendations from consultant + staff.

8. Present final report (with action plan for the change management phase) to CEOs.

ORGANIZATIONAL ANTHROPOLOGIST

Linda B. Catlin
Claymore Associates, Inc.

Claymore Associates is an anthropology-based research and management consulting firm. We work with clients to identify and articulate organizational culture issues, and to make the changes needed to achieve their strategic goals. We specialize in identifying and addressing organizational culture issues involved in mergers, acquisitions, and strategic partnerships.

Claymore’s president, Linda Catlin, is an organizational anthropologist. She and her associates bring many years of experience in the areas of human resources, healthcare management, strategic marketing, education, and consumer research to help your organization achieve its goals and fulfill its mission.

Our associates include professionals from the for-profit and nonprofit sectors.

Our goal is to provide unique, customized solutions and recommendations for each client based on that client’s mission and strategic plan.
ORGANIZATIONAL CULTURES

AS SHARED BY LINDA CATLIN:

As an organizational anthropologist, I work with clients in the for-profit and nonprofit sectors to identify and articulate organizational culture issues, and to recommend changes and steps necessary for achieving their strategic goals. Identifying and addressing these issues is particularly important when two or more organizations are merging or forming strategic partnerships since a good cultural fit is critical to the new entity’s success.

The techniques I use in working with clients are the same as cultural anthropologists use in any kind of analysis: participant-observation, in-depth interviews, focus groups, surveys, social network analysis, and projective techniques. I approach organizational assessments from a holistic perspective, i.e., I look at all levels of an organization, not just top management, and I seek to identify and understand all the subcultures in the group. My goal is to have employees identify the important issues and elements of the culture to supplement what written documents and company policies state the culture is.

COLORADO NONPROFIT ASSOCIATION

<table>
<thead>
<tr>
<th>ORGANIZATIONAL VALUES</th>
<th>FITTING IN WITH THIS ORGANIZATION</th>
<th>“MOTTO”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Innovative</td>
<td>No one is an island</td>
<td>Third sector vector</td>
</tr>
<tr>
<td>Self-starters</td>
<td>Be a team player</td>
<td></td>
</tr>
<tr>
<td>Diversity</td>
<td>Smart people work here</td>
<td></td>
</tr>
<tr>
<td>Respect for each other’s individual traits and skills</td>
<td>Adaptability</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Non-hierarchical</td>
<td></td>
</tr>
</tbody>
</table>

CNA

FLEXIBILITY AND DISCRETION

- CLAN
  - ADVOCACY
  - MARKET

- HIERARCHY
  - INTERNAL FOCUS
  - StABILITY AND CONTROL

- MARKET
  - FLEXIBILITY AND DISCRETION

Non-hierarchical

Third sector vector
COLORADO NONPROFIT DEVELOPMENT CENTER

ORGANIZATIONAL VALUES
- Partnership
- Goal-oriented
- Teamwork
- Accountability
- Taking the perspectives of others into consideration

FITTING IN WITH THIS ORGANIZATION
- Approachable, can talk to anyone
- Flexibility
- Flat organization

“MOTTO”
We value what you bring to the table

COMMUNITY RESOURCE CENTER

ORGANIZATIONAL VALUES
- Diversity
- Inclusivity
- Collaboration
- Risk-takers, cutting edge
- Leading from behind

FITTING IN WITH THIS ORGANIZATION
- Build relationships with staff
- Ask questions
- Know how to prioritize
- Expect every day to be different

“MOTTO”
We help nonprofits do good work better
### COMMUNITY SHARES OF COLORADO

<table>
<thead>
<tr>
<th>ORGANIZATIONAL VALUES</th>
<th>FITTING IN WITH THIS ORGANIZATION</th>
<th>“MOTTO”</th>
</tr>
</thead>
<tbody>
<tr>
<td>o Self-management</td>
<td>o Work hard and have fun</td>
<td>Our differences make us stronger</td>
</tr>
<tr>
<td>o Integrity</td>
<td>o Teamwork</td>
<td></td>
</tr>
<tr>
<td>o Inclusivity</td>
<td>o Honest with each other</td>
<td></td>
</tr>
<tr>
<td>o Respect for one another and the work we do</td>
<td>o Outcome-oriented</td>
<td></td>
</tr>
<tr>
<td>o Emphasis on conflict management</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### METRO VOLUNTEERS

<table>
<thead>
<tr>
<th>ORGANIZATIONAL VALUES</th>
<th>FITTING IN WITH THIS ORGANIZATION</th>
<th>“MOTTO”</th>
</tr>
</thead>
<tbody>
<tr>
<td>o All people are important</td>
<td>o Jump in and get to work</td>
<td>More with more</td>
</tr>
<tr>
<td>o Innovation</td>
<td>o Fluid organization</td>
<td></td>
</tr>
<tr>
<td>o Modeling (leaders in the field)</td>
<td>o Welcoming environment</td>
<td></td>
</tr>
<tr>
<td>o Teamwork</td>
<td></td>
<td></td>
</tr>
<tr>
<td>o Adaptability</td>
<td></td>
<td></td>
</tr>
<tr>
<td>o Collaboration</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
CONSULTANT RECOMMENDATIONS
FROM CLAYMORE ASSOCIATES REPORT: BUILDING THE COLLABORATIVE CULTURE

When you step into an intersection of fields, disciplines, and cultures, you can combine existing concepts into a large number of extraordinary new ideas. – Frans Johansson, The Medici Effect

In 15th century Florence, the Medici family brought together an unparalleled group of painters, poets, sculptors, scientists and architects. The synergy of ideas resulting from the interaction among these individuals produced the origins of the Renaissance, one of the most innovative periods in human history.

Similarly, the Colorado Collaborative for Nonprofits (CCN) brings together five nonprofit organizations in one physical space with a vision for creating an intersection such as Johansson describes in The Medici Effect, or as CCN describes it in its vision statement, a “Town Square” for the nonprofit sector. In this intersection of different organizational cultures, missions, and staff expertise, the goal is to create a “renaissance” of sorts in the nonprofit sector, a place where existing programs, ideas, and resources can be combined into a “large number of extraordinary new ideas.”

The purpose of this report is to recommend ways to foster and implement the collaboration among the five organizations to produce these new ideas, programs, and achievements.

AS SHARED BY LINDA CATLIN:

The Greek aphorism, “Know thyself”, is especially apt when talking about creating a culture of collaboration and fostering the synergy that the organizations in the Shared Space Project hope will emerge from living and working together. By doing a brief, quick assessment of each of the five cultures, I was able to identify the key values and strengths each organization can contribute to a collective culture.

Changing or creating the culture of an organization, or in this case, the culture of a group, takes time and deliberate planning. It also involves people at all levels of the organizations because a culture is created by everyone in the group. The first step in the process is to define each culture explicitly so staff can then use the elements of those cultures as building blocks in the collaborative culture of the Shared Space Project.

In addition to an analysis of the information from the cultural assessments of the five nonprofits, the recommendations outlined below are based on:

- best management practices and organizational development theory;
- knowledge of other organizations with similar issues;
- suggestions generated by members of the five organizations during an all-staff workshop; and
- experience in consulting with many nonprofits and for-profits.
## Consultant Report: Initial Summary of Recommendations For Building a Collaborative Culture

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Priority</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop a vision statement for CCN.</td>
<td>1</td>
<td>CEOs/staffs</td>
</tr>
<tr>
<td>Develop a plan for publicizing CCN.</td>
<td>1</td>
<td>Committee</td>
</tr>
<tr>
<td>Decide on one “showcase project” that all organizations can contribute to or be involved in, and which can be completed in a short time span, e.g., 3-5 months.</td>
<td>1</td>
<td>Committee composed of key marketing/communications representatives from all five organizations</td>
</tr>
<tr>
<td>Designate an area as the “Intersection Zone” – a visible and tangible space where people can meet and congregate to share ideas.</td>
<td>1</td>
<td>Groups organized by function, e.g., program staff from all organizations</td>
</tr>
<tr>
<td>Develop an on-line learning community using a blueprint to catalog the knowledge and skills of individual partners (analogous to a skill set inventory for volunteers).</td>
<td>2</td>
<td>Committee of staff members from all five organizations</td>
</tr>
<tr>
<td>Adopt a set of values for the collaborative culture.</td>
<td>1</td>
<td>All staff</td>
</tr>
<tr>
<td>Determine each organization’s challenges and devise a way for some or all of the others to collaborate on working on these.</td>
<td>2</td>
<td>CEOs with a committee to assist</td>
</tr>
<tr>
<td>Develop and distribute your shared leadership model, including a description of how decisions are made for the group.</td>
<td>1</td>
<td>CEOs</td>
</tr>
<tr>
<td>Develop a reward system for staff contributing to the collaborative efforts.</td>
<td>1</td>
<td>CEOs</td>
</tr>
<tr>
<td>Schedule quarterly all-staff meetings to work on specific collaborative projects and to build cohesion among five groups.</td>
<td>1</td>
<td>CEOs</td>
</tr>
<tr>
<td>Develop a shared plan of some dimension, e.g., fund-raising or training, to “kick-start” the collaboration.</td>
<td>2</td>
<td>CEOs with committee</td>
</tr>
<tr>
<td>Plan specific ways to involve board members across the five organizations in a way that will enhance collaboration among the five organizations.</td>
<td>2</td>
<td>CEOs/board members</td>
</tr>
<tr>
<td>Institutionalize creativity by building activities into staff meetings.</td>
<td>2</td>
<td>CEOs/staff members</td>
</tr>
<tr>
<td>Solicit ideas from your staff members on how to collaborate and foster ties among organizations.</td>
<td>1</td>
<td>CEOs</td>
</tr>
</tbody>
</table>
EXECUTIVE RESPONSE AND PRIORITIES

After moving into the space and engaging the staff in the Organizational Culture Report on December 5, 2012, the executives needed to prioritize a series of outstanding projects. Top priorities included:

- Raising money to complete capital construction, change management work, and strategic planning
- Finishing construction (signage, furniture, data, catering)
- Hosting an Open House for 300+ stakeholders
- Development of operations and safety norms
- Implementing culture recommendations

In March of 2013 the executives requested Dace West, the Director of the Denver Office of Strategic Partnerships, to facilitate a meeting to establish next steps and a timeline for moving forward. Out of that meeting, the executives agreed to ranked priorities, assigned executive sponsors, and prescribed responses to the recommendations.

### EXECUTIVE RESPONSE AND PRIORITIES FOR BUILDING A COLLABORATIVE CULTURE

<table>
<thead>
<tr>
<th>RECOMMENDATION</th>
<th>PRIORITY</th>
<th>RESPONSIBLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Adopt a set of values for the collaborative culture.</td>
<td>1</td>
<td>All staff</td>
</tr>
</tbody>
</table>

**RESPONSE**
The Executives committed to our organizations reaching consensus on a social contract outlining core values and expectations for interaction and engagement of members of the cohort. We believe a social contract or cohort values statement will decrease conflict due to differences in organizational culture and personal styles.

**CHAMPION**: Alyssa Kopf (CSC)
**TIMELINE**: March 2013 – July 2013

<table>
<thead>
<tr>
<th>RECOMMENDATION</th>
<th>PRIORITY</th>
<th>RESPONSIBLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Designate an area as the “Intersection Zone” – a visible and tangible space where people can meet and congregate to share ideas.</td>
<td>1</td>
<td>Groups organized by function, e.g., program staff from all organizations</td>
</tr>
</tbody>
</table>

**RESPONSE**
Purchased Allsteel’s “Gather Collection” for the lobby of the training room. The furniture is modern and flexible and provides a spontaneous meeting area.

**CHAMPION**: Renny Fagan (CNA) and Kristy Judd (MV)
**TIMELINE**: February 2013 (Ongoing)

<table>
<thead>
<tr>
<th>RECOMMENDATION</th>
<th>PRIORITY</th>
<th>RESPONSIBLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Develop a reward system for staff contributing to the collaborative efforts.</td>
<td>1</td>
<td>CEOs</td>
</tr>
</tbody>
</table>

**RESPONSE**
The Fun Wagon introduced “Collaborative Ca$h” 3.11.13. People earn Collaborative Ca$h by attending monthly brown bag lunches, participating on committees, ad hoc events such as March Madness and Wellness Walks, and participating in social media campaigns.

**CHAMPION**: Alyssa Kopf (CSC)
**TIMELINE**: March 2013 (Ongoing)

<table>
<thead>
<tr>
<th>RECOMMENDATION</th>
<th>PRIORITY</th>
<th>RESPONSIBLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Engage senior staff in cohort leadership to increase buy-in and support future executive transition.</td>
<td>2</td>
<td>CEOs</td>
</tr>
<tr>
<td>RESPONSE</td>
<td>CHAMPION: Melinda Higgs (CNDC)</td>
<td>TIMELINE: March 2013 (Ongoing)</td>
</tr>
<tr>
<td>----------</td>
<td>---------------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>5. Solicit ideas from your staff members on how to collaborate and foster ties among organizations</td>
<td>CEOs</td>
<td>2</td>
</tr>
<tr>
<td>Future workshop on inspiring creativity and dialogue between organizations.</td>
<td>CHAMPION: Alyssa Kopf (CSC)</td>
<td>TIMELINE: Q4 2013 or Q1 2014</td>
</tr>
<tr>
<td>6. Schedule all-staff meetings as needed to work on specific collaborative projects and to build cohesion among five groups.</td>
<td>CEOs</td>
<td>2</td>
</tr>
<tr>
<td><strong>RESPONSE</strong></td>
<td></td>
<td>TIMELINE: December 2012 – Ongoing</td>
</tr>
<tr>
<td>All cohort events (beyond the initial formal integration work) include monthly brown bag lunches hosted by each nonprofit member of the cohort to give an overview of the mission and purpose of each organization, a holiday cookie exchange in 2012, a summer picnic in July 2013, and the 2013 holiday party where people can redeem their Collaborative Ca$h. After Phase 3 Strategic Planning is completed in fall of 2013, staff will begin working on collaborative projects.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Develop and distribute your shared leadership model (i.e., Governance Agreement), including a description of how decisions are made for the group</td>
<td>CEOs</td>
<td>2</td>
</tr>
<tr>
<td><strong>RESPONSE</strong></td>
<td>CHAMPION: Renny Fagan (CNA)</td>
<td>TIMELINE: December 2012</td>
</tr>
<tr>
<td>MOU for Governance includes a consensus-based decision framework.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Plan specific ways to involve board members across the five organizations in a way that will enhance collaboration among the five organizations</td>
<td>CEOs/board members</td>
<td>Phase 3</td>
</tr>
<tr>
<td><strong>RESPONSE</strong></td>
<td>CHAMPION: Kristy Judd (MV)</td>
<td></td>
</tr>
<tr>
<td>Seek to identify shared goals and objectives that can be added to the strategic plans of all five organizations.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Determine each organization’s challenges and devise a way for some or all of the others to collaborate on working on these.</td>
<td>CEOs</td>
<td>TBD</td>
</tr>
<tr>
<td><strong>RESPONSE</strong></td>
<td></td>
<td>TIMELINE: March 2013 – Ongoing</td>
</tr>
<tr>
<td>Added organizational updates to executive meeting agendas in March 2013.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Decide on one “showcase project” that all organizations can contribute to or be involved in, and which can be completed in a short time span, e.g., 3-5 months.</td>
<td>CEOs and Education/Training Staff</td>
<td>TBD</td>
</tr>
<tr>
<td><strong>RESPONSE</strong></td>
<td>CHAMPION: Kristy Judd (MV)</td>
<td>TIMELINE: July 2013 – November 2013</td>
</tr>
<tr>
<td>Strategic planning examining the business model of the Training Center and opportunities for shared programming.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
STAFF ENGAGEMENT COMMITTEE

STAFFING AND LEADERSHIP

Although executive leadership would create and distribute a plan for change, it was essential staff members were engaged as co-owners of the project. A committee was established tasked with designing and executing social events for the members of the cohort linked to our change management goals.

PURPOSE

The purpose of the social engagement committee, originally called the “Welcome Wagon” – then named the “Fun Wagon” for ongoing activities – is to extend change management leadership to a peer contact within each organization.

MEMBERS

The executives were each asked to choose a staff member for the committee who would be likely to drive buy-in from colleagues and bring enthusiasm to the effort. It was also important that some members of the group manage events for their respective organizations and could be very thoughtful in planning for group meetings and celebrations.
DAY 1 WELCOME WAGON INITIATIVES

To welcome staff on the first Monday following the move, the Welcome Wagon ordered lunch bags reading “Founding Team Member: Colorado Collaborative for Nonprofits.” On the weekend before the move-in the bags were placed on the door to each office and on the desk of each cubicle and included a stress ball, candy, and an invitation to the cohort-wide welcome breakfast.

The Welcome Wagon collected digital photos of every member of the cohort, birthdays, and a few fun facts. This was assembled into a single document to help cohort members learn staff names and organizations. A hard copy was given to each organization and all staff members could access the document online.

To help people find and way find in the new space, the Welcome Wagon created a display in the break room. Using a floor plan, the committee placed photos with the name and title of each staff member in their work area.
WELCOME BREAKFAST

INDIVIDUAL INTRODUCTIONS
All staff members introduced themselves by saying their name and something they like which starts with the same letter. (e.g., “My name is Alyssa from Community Shares and I like arithmetic.”) With the number of people involved the exercise kept a good pace and allowed people to choose the level of personal information to share.

ORGANIZATION INTRODUCTIONS
A local restaurant donated coffee and breakfast for the meeting. While staff members enjoyed breakfast, the executive of each of the organizations had 3-5 minutes to welcome everyone to The Collaborative and give a brief overview of the mission and purpose of their nonprofit.

MISSION SCRAMBLE
Staff members were divided into six groups labeled by color with at least one member of each organization represented. Each organization’s mission statement was printed out and cut into individual words and groups of words and placed in a paper bag. The teams were challenged to assemble the six mission statements correctly. The winning team received $5 gift cards to a nearby restaurant as prizes. This proved to be a fun way for people to learn the mission statements of each organization.

COLLABORATIVE PASSPORT
The morning concluded with the distribution of Collaborative Passports. The passports included a 1-page overview of each organization and thirty questions to complete by identifying a cohort member who met the criteria. (e.g., “Has lived out of the US for more than six months.”) Anyone who collected 20 signatures went into a drawing for prizes at the next gathering of the entire cohort.
COLLABORATIVE CASH

To incentivize participation in collective activities, Collaborative Cash was introduced in April of 2013. Collaborative Cash was announced as “a fun way to get employees from all organizations involved in activities throughout the year.” Individuals earn the cash through participating in a variety of activities. The cash collected by each individual can be used to bid on silent auction items at the year-end holiday party in December.

OPPORTUNITIES TO EARN COLLABORATIVE CASH

- Attend informational brown bag lunches
- Attend safety and wellness trainings
- Serve on committees or task forces
- Participate in Wellness Walks
- Volunteer to represent The Collaborative at community events
- Complete posts on The Collaborative’s social media sites
- Share social media posts on your personal pages
- Provide content (text and images) for The Collaborative’s website
- “Random Acts of Collaborativeness”
SOCIAL CONTRACT

A stated deliverable for the change management initiative was to “work as a team to create a Social Contract for the staff of the shared space project ratifying our mutually selected rules of engagement as a new community.” A “Social Contract” is a philosophic theory that portends the moral and civil obligations of a group of people are grounded in a mutual agreement to form a society. To receive the benefits of being a part of the society, each individual must agree to meet the obligations of being part of the group. According to Seawell (2012), a Social Contract is the “foundational agreement that ties a human organization together.” Seawell stresses effective Social Contracts are “foundational”, “contractual”, and “enforceable”.

FOUNDATIONAL

- Consider and address the most basic concerns the members of a team have at the outset of their relationship as team members
- Respect, safety, communication, etc.

CONTRACTUAL

- Agreements are voluntary and consensual
- In small groups should be reached by consensus

ENFORCEABLE

- The defining mark of an effective team is that “it holds itself accountable”
- The team, not the top authority, assures compliance
ENGAGING THE TEAM

Because of the size and varying styles of the organizations, it was important to engage staff members early in the process and invite them to participate in multiple steps in the process of coming to consensus on a social contract. As was learned in the work with the organizational anthropologist, it would be very difficult to gather the entire staff of each organization let-alone the entire cohort for a series of discussions. Instead, the leadership team used staff meetings and surveys to gather input and engaged the entire cohort in reaching consensus on the social contract at the 2013 Collaborative Summer Picnic.

For the first step in the process, the executive leaders were asked to set time aside at a staff meeting to review their organization’s values/ethics/norms and discuss which values were most important to be brought over to The Collaborative. This gave staff members the opportunity to be candid with their peers about their fears and identify the most significant aspects of their historic organizational culture. These conversations also allowed for groups to set aspirational goals for the new space.

The five executive submitted their list of values and common themes were identified. However, there was surprisingly little common language despite similar concepts. This illuminated a point of potential contention if language differences negatively influenced the resonance of core commitments. To address this issue, staff members were asked to complete two brief surveys. The purpose of the first survey was to agree to common language and key concepts for the social contract. Individuals were asked to identify words and concepts they found most important from a list of options from all five organizations’ individual values statements. The survey was completed by 39 members of the cohort. The purpose of the second survey was test for resonance of the proposed social contract and was completed by 23 members of the cohort. Based on the responses, Six Core Commitments were identified for the social contract.
## COMMON LANGUAGE SURVEY RESULTS

<table>
<thead>
<tr>
<th>ANSWER CHOICES</th>
<th>VOTES</th>
<th>RESPONSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Respectful</td>
<td>24</td>
<td>63.16%</td>
</tr>
<tr>
<td>Friendly</td>
<td>21</td>
<td>55.26%</td>
</tr>
<tr>
<td>Open-minded</td>
<td>19</td>
<td>50%</td>
</tr>
<tr>
<td>Communicate</td>
<td>18</td>
<td>47.37%</td>
</tr>
<tr>
<td>Collaborative</td>
<td>16</td>
<td>42.11%</td>
</tr>
<tr>
<td>Support</td>
<td>14</td>
<td>36.84%</td>
</tr>
<tr>
<td>Inclusive</td>
<td>13</td>
<td>34.21%</td>
</tr>
<tr>
<td>Positive</td>
<td>13</td>
<td>34.21%</td>
</tr>
<tr>
<td>Accountable</td>
<td>12</td>
<td>31.58%</td>
</tr>
<tr>
<td>Open-door</td>
<td>11</td>
<td>28.95%</td>
</tr>
<tr>
<td>Partnership</td>
<td>11</td>
<td>28.95%</td>
</tr>
<tr>
<td>Listen</td>
<td>11</td>
<td>28.95%</td>
</tr>
<tr>
<td>Welcoming</td>
<td>10</td>
<td>26.32%</td>
</tr>
<tr>
<td>Equality</td>
<td>9</td>
<td>23.68%</td>
</tr>
<tr>
<td>Organized</td>
<td>8</td>
<td>21.05%</td>
</tr>
<tr>
<td>Honest</td>
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### KEY CONCEPT SURVEY RESULTS

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<tr>
<td>It is important we treat each other respectfully.</td>
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<td>It is important we value our differences.</td>
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<td>It is important we be personally responsible for our behavior.</td>
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<td>It is important we work together.</td>
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<td>It is important we learn from each other.</td>
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<td>It is important we understand the mission and purpose of each of our organizations.</td>
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<td>It is important to listen to others.</td>
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<tr>
<td>It is important we treat others the way we would like others to treat us.</td>
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<td>It is important we recognize the value others bring to the collaborative.</td>
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<td>It is important others value the collaborative as a hub for the nonprofit sector.</td>
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<tr>
<td>It is important we participate in finding solutions to problems.</td>
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<td>It is important we take time to know each other as individuals.</td>
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<td>It is important to follow-through on commitments.</td>
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<td>It is important we assume positive intent.</td>
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<td>It is important we aren’t all expected to behave the same.</td>
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<tr>
<td>It is important conflicts should be resolved between individuals.</td>
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<tr>
<td>It is important people keep their workspace clean and organized.</td>
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<tr>
<td>It is important we try new things.</td>
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<tr>
<td>It is important we be patient with each other.</td>
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<tr>
<td>It is important that each individual be allowed to select their level of participation in The Collaborative.</td>
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<tr>
<td>It is important when we are not sure of someone’s motivation, we ask open-ended questions with positive intent.</td>
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<td>It is important conflict should be resolved by executive leadership.</td>
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<tr>
<td>It is important we provide a quiet work environment and not distract others.</td>
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INAUGURAL SOCIAL CONTRACT

JULY 17, 2013

SIX CORE COMMITMENTS

1. WELCOMING ENVIRONMENT
2. PROFESSIONAL RESPECT
3. PROACTIVE COMMUNICATION
4. ORGANIZATIONAL SUPPORT
5. OPEN-MINDED SOLUTIONS
6. PERSONAL ACCOUNTABILITY

WELCOMING ENVIRONMENT: We agree to uphold The Collaborative as a hub for the nonprofit sector and will strive to create a friendly and welcoming environment for all staff members and guests.

PROFESSIONAL RESPECT: We agree to create a professional workspace that balances an “open-door” approach to collaboration with respect for each other’s privacy, space, and time.

PROACTIVE COMMUNICATION: We agree to proactively communicate with each other to establish an inclusive environment and strengthen partnerships between our organizations.

ORGANIZATIONAL SUPPORT: We agree to support the work of each organization in the cohort by learning our missions, purposes, and activities so we can serve as ambassadors and advocates for each other.

OPEN-MINDED SOLUTIONS: We agree to keep an open mind and listen to each other so we can work together to resolve conflicts and find solutions to challenges.

PERSONAL ACCOUNTABILITY: We agree to maintain the quality and safety of the workspace by observing operational norms and being personally accountable for our behavior.
STAFF INTERVIEWS

IMPORTANT CONSIDERATIONS AND SUGGESTIONS

1. The time considerations of taking on a project of this scale should not be underestimated.
   - Individual strategic and operational plans should include executives working at a diminished capacity
   - Consider approaches for offloading day-to-day responsibilities from the executive director during shared space planning

2. It was important to carefully select the organizations that would participate in the project.
   - Core considerations: mission alignment, executive buy-in, and financial stability
   - Selection of collaboration partners should be carefully considered

3. Day-to-day interpersonal interactions between staff are highly influential in “proof” of cultural work
   - Moving into shared space is like moving in with roommates you haven’t chosen
   - Etiquette around open doors and cubes and use of the kitchen is an ongoing issue
   - Consider approaches for rewarding adoption of organizational culture and flexibility in day-to-day interactions

4. Board and staff members need ongoing context and a compelling case for support to increase buy-in
   - Some operational efficiencies have been realized but much work remains on shared services and program collaboration; future gains require ongoing board and staff support
   - The WIFM (what’s in it for me) should be clearly articulated to all staff members throughout the process and individual initiatives

5. Organizational culture work is a process, not a single event with a finish line
   - The cultural assessments were essential in building self-awareness as well as informing the other teams of the differences that they would face
   - It is important to maintain a commitment to culture through the ebbs and flows of the year
   - There should be staff leadership in welcoming new staff and formally introducing the shared space concept, social contract, and unspoken culture norms and ongoing points of conflict
   - It is important to empower, guide, and maintain a staff-led organizational culture committee with ongoing responsibilities

6. Aside from the obvious and expected benefits, there were some encouraging yet unintended surprises
   - Sharing space provided an opportunity for staff from each organization to identify new leadership roles and begin working together
   - There has been an increase in the energy level in the office due to new collaborators and peers
   - The executives greatly value the ability to spontaneously connect due to sharing space with a set of peers
   - Encourage and institutionalize creativity, interaction, and idea sharing
WHAT WAS THE ORIGINAL GOAL OF THE WELCOME WAGON COMMITTEE?

- It was a first gathering of people from each organization
- Create a fun aspect within daily stresses
- Get to know each other on a personal level
- Get to know other people in the new office before moving into the space
- Make people feel comfortable about the new space
- The team was going to welcome everyone and set the tone for what it could be like to work together
- To create a sense of camaraderie

WHAT IDEAS DID YOU PUT INTO PLACE TO HELP WELCOME STAFF MEMBERS TO THE NEW SPACE AND ENCOURAGE INTERACTION?

- Welcome package @ desks + invitation to welcome breakfast on the first day everyone was in the space
- A bulletin board in the kitchen
- Welcome lunch bag
- Welcome lunch within the first 2 weeks
- Name tags for first month
- A directory of staff with pictures with some facts about people (fun)
- Having activities during business hours, making it easy to participate
- There was an introductory social hour earlier in the fall before the move

ARE THERE SPECIFIC ACTIONS THE WELCOME WAGON TOOK ON THAT YOU WOULD RECOMMEND TO OTHER NONPROFITS MOVING IN TOGETHER?

- One person from each organization is responsible for relaying messages within
- Opening day – the welcome bag and goodies that were in it
- The facebook / directory with a picture, name, organization and fun facts
- Look for ways to break the ice
- The passport signing contest to get people to know each other
- A collaboration website w/ staff login - kept current.
- Communication lines are established – keep them open

WAS IT IMPORTANT FOR STAFF MEMBERS TO LEAD THIS COMMITTEE VERSUS THE EXECUTIVE DIRECTORS? WHY OR WHY NOT?

- Yes, the involvement also built a sense of ownership
- Yes, different voices, leadership qualities, and characteristics
- Yes, executives are focused on the big picture and they may have informally delegated rather than purposefully
- Having executive support (and participation) was very important
- Participation from every organization is definitely important
WHAT HAVE THE STICKING POINTS BEEN FOR YOUR CO-WORKERS? WHERE DID YOU MEET RESISTANCE?

- It has been fascinating to see how different people are
- Some people are not as involved, but we work through issues as they come up
- The training committee has had some issues with using shared space
- There have been a few issues with the building itself
- So many committees eat into ‘real’ productive time and it is difficult to mix in
- The kitchen is always a problem; people don’t pick up after themselves
- Everybody wants it to work so many people try to keep it working (doing others’ dishes) much like roommates
- Time and priorities of getting involved were sticking points

WHAT DID YOU THINK OF THE ORGANIZATIONAL CULTURE ASSESSMENTS MADE BY LINDA CATLIN? DID THEY HELP YOU IDENTIFY POTENTIAL TROUBLE AREAS? DID YOU FEEL IT WAS ACCURATE FOR YOUR STAFF?

- Very accurate and synthesized information about each organization
- It helped understanding of the groups
  - My group was very team oriented while other groups were not
  - We recognized that we had different levels of empowerment and decision making
- It was unclear what we were supposed to do with it and difficult to take action
  - The results were interesting but nothing has happened
- They were accurate and took away anxiety
- They were beneficial and helped to build the culture within

WHAT DO YOU THINK THE ROLE OF THE COMMITTEE SHOULD BE MOVING FORWARD?

- Continue events, at least quarterly; it is important to build non-business relationships.
- Continue with perpetual activities, particularly to introduce new people
- Do big things like summer celebrations and holiday parties
- It is a good opportunity for the team to engage with other people on the floor
- Possibly try to incorporate educational components versus just having fun
- Provide opportunities to kick start the networking and learn about other organizations
- The committee should continue to plan events; there is still more work to do

WHAT KIND OF SUPPORT DOES THIS TYPE OF COMMITTEE NEED TO BE SUCCESSFUL? (E.G., EXECUTIVE LEADERSHIP, AUTHORITY, FUNDING, ETC.?)

- Allowance from teams to set-aside time to participate
- Executive champion was engaged and could be an ED mouthpiece; beneficial to have the ED perspective at the table
- Buy-in from EDs of the goals
- Authority and continued executive support
- Funding and a clearer idea of budget (per event or yearly)
- More definition, possible rotation into the committee
WHAT ELSE?

- Good experience overall that has improved overall satisfaction with the job
  - Have an opportunity to learn about other programs and meet other staff
  - Broader exposure
  - Changed the office dynamics for the better
  - Really like this space and opportunities
  - Opportunity to work with peer groups outside of organization
- EDs have eyes on the big picture and miss little things that are important on a daily basis
- Moving into space like this is like moving in with roommates; still a ways to go on respecting people’s time and space and interpersonal etiquette
- Not every organization is a team player; some seem intentionally isolated
- Staff turnover has an impact and introducing new people to the space is important

EXECUTIVE INTERVIEW NOTES

WHAT MOTIVATED YOU TO PARTICIPATE IN A CHANGE MANAGEMENT INITIATIVE?

- Collaboration
  - The organization would become more effective by having strategic collaboration with partners; especially those with aligned missions
  - The desire to be a leader in collaboration and do more
  - The potential of achieving a greater outcome for the mission
  - Principle of openness vs. closed and making a larger impact
- Efficiencies
  - A few groups were growing out of their existing space and this saved money in the future
  - Operational efficiencies
  - Promise of programmatic collaboration
- Engagement in a larger process
  - Exposure to new learnings; had great expertise with process consultants and architects
  - Creative thinking and problem solving
  - Contributors like Dace West and Brett Miller drove the process forward

WHAT WERE YOUR BIGGEST CONCERNS ABOUT INTEGRATING YOUR STAFF INTO THE LARGER GROUP?

- Collaboration and Shared Space
  - Balancing everyone’s individual need to succeed in their own missions and participate in this project
  - Concern about the ability to affect change using space as a strategy
  - Could five organizations achieve something different for the Colorado non-profit community?
  - There was an expectation that we could make a difference together that couldn’t be done individually – can we meet external expectations and timelines?
• Process
  o Space sometimes led the conversation, sometimes it was the vision
  o Concerned about processes driving constructive conflict
  o Principle around space – if it isn’t designed to work for one, it shouldn’t work for any
  o With a long lease, is there adequate room for growth?
• Dynamics
  o In the early days, financial stability of other groups and greater transparency
  o Lots of dynamics being balanced with 5 different organizations (leases ending, growth/expansion opportunities, space needs)
  o The combination of different cultures

LOOKING AT LINDA'S SUMMARY OF ORGANIZATIONAL VALUES, FITTING IN, AND MOTTO, DO YOU FEEL IT WAS ACCURATE AT THE TIME? IS IT STILL ACCURATE?

• Overall Assessment
  o Generally accurate
  o It was a useful activity for the staff as they learned about their own organization (as well as the others that they would be joining)
  o The exercise was fun although it was tough to give up control of culture and even assessment of culture as a director
  o Exposed differences in style that weren’t being discussed at the executive level
• Internal Dynamics
  o Some groups have maintained an internal focus and have not changed cultural norms
  o Change in executive leadership influences culture
  o It was accurate at the time but is not accurate now due to changes in leadership
  o Many staff changes over time could impact accuracy
• Executive Perspectives
  o Challenge wasn’t with cultures of teams, but for EDs when learning how to make decisions together
  o Need for common language
  o EDs each had different levels of commitment for different topics; it should be accepted upfront that not all executives will bring the same level of buy-in to every issue

WERE THERE ANY UNEXPECTED CHALLENGES IN MOVING YOUR STAFF INTO THE SHARED SPACE?

• Culture and Conflict
  o Collaboration went slower than it could have, specifically at the director level
  o It was much more difficult for the executives to come up with norms for making decisions and addressing conflict than anticipated; dominant personalities would sometimes overwhelm collective thinking
  o In the early phases of the project, it was abstract which created anxiety for people; turned to excitement when it became more real – when you could walk the floor and see the space
  o There are collaboration opportunities that have been submitted to directors, but they are still pending
• Space Planning
  o New people also question prior decisions (doors, offices, cubes) and don’t necessarily embrace floor plan
o (e.g., Why would an intern on one team have an office or a door while a more senior person on another have a cube?)
  o Different levels of entitlement for each team which dictated size of space
  o Those who were more willing to compromise gave up space to those who issued ultimatums
  o In most of the world, offices are status positions
  o Some organizations downsized their space, both individually and collectively; still adapting to higher traffic with more activity and buzz

- Implementation
  o Due to staff size and daily activities, organizations have different expectations for daily maintenance
  o Greatest challenges are over interpersonal overlap in shared spaces such as the kitchen; it isn’t unique to the shared space project
  o Must reinforce the mission of the space when there are staff changes

WERE THERE ANY UNEXPECTED BENEFITS IN MOVING YOUR STAFF INTO THE SHARED SPACE?

- Energy and Interaction
  o Access to 4 other executives is huge; have a peer group on the floor to bounce ideas off of and consult with
  o An increase in energy level due to the interactions with other organizations
  o More spontaneous connections
  o Happy to be working together on different issues
  o Pleasantly surprised about cohesiveness and integration

- Outreach and Externals
  o The project has drawn a lot of attention from the non-profit sector
  o Very positive feedback about how well it is working
  o Exposure to broader group of stakeholders from the community for all organizations
  o People haven’t become “turfy” and have facilitated interactions with new stakeholders

- Functional
  o Renny & the Master Tenant relationship have been great.
  o Space project provided new roles and leadership opportunities for staff
  o If paper towels and dishes are the biggest problems, it has been very, very successful

- Momentum
  o The ability to align and combine programs
  o Based on this trust that has been developed, the next phase could move more quickly

WHAT SHOULD OTHER EXECUTIVES CONSIDERING MOVING INTO SHARED SPACE KNOW ABOUT LEADING CHANGE?

- Executive Role
  o Demands of the executive role and time commitment are extensive and occasionally overwhelming
  o The time commitment of a project like this is HUGE; it took 2 ½ years to get the lease
  o It takes away from the day-to-day responsibilities of the ED and the team
  o It is like a second executive job on top of day-to-day responsibilities
  o Requires creative thinking, research, preparation, and accountability
Need to have contingency plans to ensure critical functions/responsibilities are covered while the ED is participating

- Written communication to the board (can’t involve the entire board in the strategy)
- Try to discover early the impact on your mission
- Evaluate known disruptions and factor in unintended impacts

- Shared Space and Collaboration
  - Everyone needs to be honest about their wants/needs in the space
  - Have awareness this is a process; requires give and take and it doesn’t come together overnight
  - Need to partner with a few groups that are strong financially
  - Understand what services are included and what is not in the space (e.g., something like routine carpet cleaning might be important to one group only)

- Case for Support
  - The case for support and vision will translate differently to the staff and board
  - Success is based on the combination of the practical and ideals
  - Financials, etc. must make sense but the bigger purpose of the concept is what tips it into favor
  - Need board support
  - Have a good business case for your board of directors; particularly the cost differential commitments
  - Need staff commitment about the purpose of doing this
  - Recognize that staff plays a role in making a transition like this happen successfully
  - Need board, staff, funders to understand all of the benefits; the savings and efficiencies are good, but the payoff is in the collaboration (which isn’t as tangible)

- Going Forward
  - The next phase (strategic planning) will have a bigger impact than the move
  - Now have a broader network in the non-profit community – useful when making hiring decisions
  - Build processes to foster interaction with the other organizations
  - Need to have a system in place to address new staff in the space
  - Need to want to spent time with the other organizations
  - Shared space is an evolutionary process; be open minded and ready to take a calculated risk
WORKS CITED


LEADING CHANGE IN SHARED SPACES

How the Colorado Collaborative for Nonprofits integrated six missions and sixty-five staff to create a shared workspace and hub for the nonprofit sector.

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