HOW SIX BROOKLYN CULTURAL INSTITUTIONS DEVELOPED A CAPACITY TO DIAGNOSE COMMUNITY NEED AND RESPOND WITH COLLABORATIVE PROGRAMS

A COLLABORATION WORKBOOK

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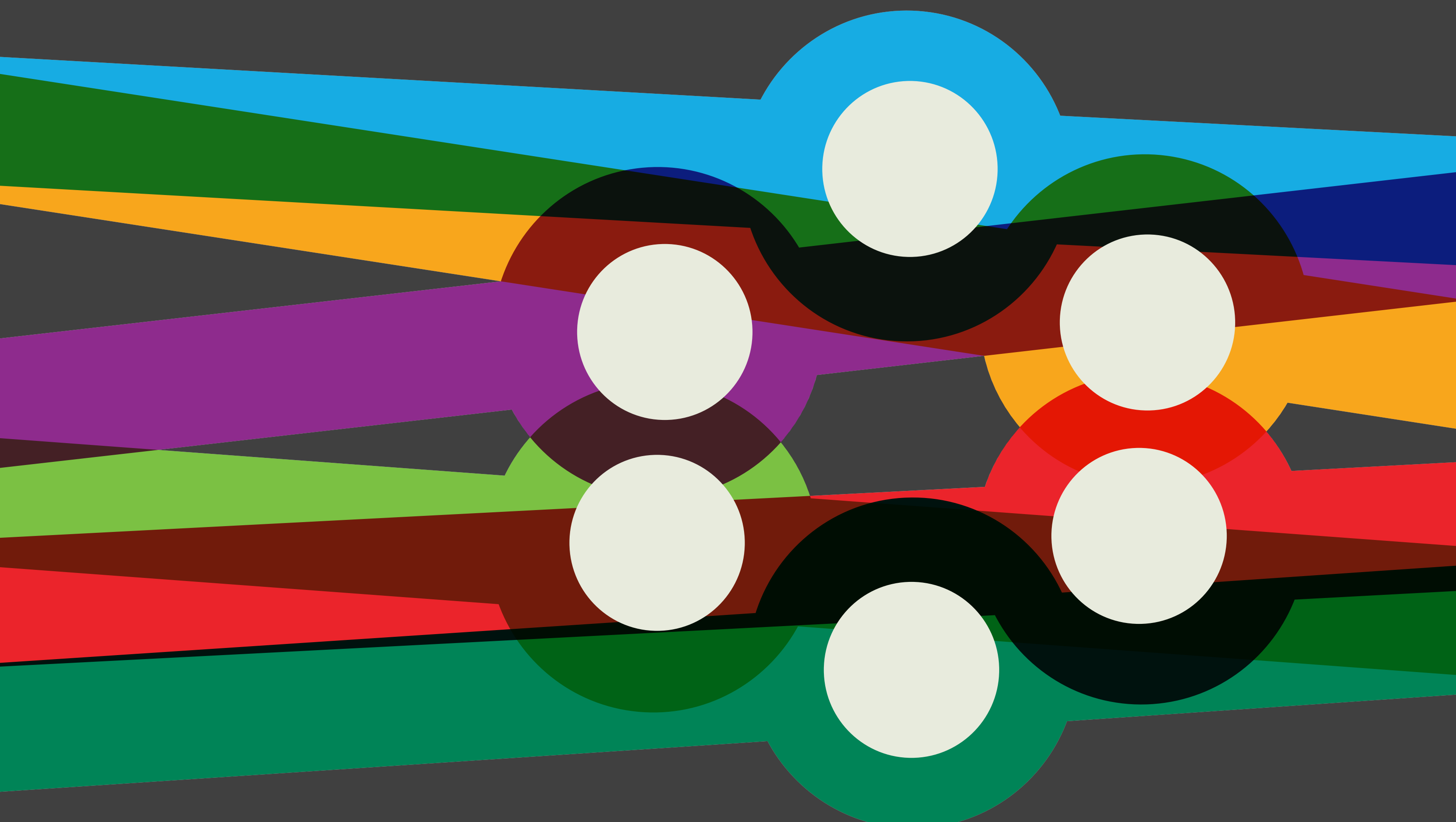

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Over the two-year period from 2011-13, the six Heart of Brooklyn (HOB) cultural institutions designed, pilot tested, and evaluated a process for conceiving and implementing collaborative programs that address community needs. The overall purpose of the Building Strong Community Networks (BSCN) project was to build capacity for diagnosing and responding creatively to community needs through the diverse cultural assets of the six HOB members – Brooklyn Botanic Garden, Brooklyn Children's Museum, Brooklyn Museum, Brooklyn Public Library, Prospect Park Alliance and Prospect Park Zoo.

This **"Collaboration Workbook"** distills what was learned, in hopes of advancing the field's understanding of how dissimilar cultural institutions that share the same community can find common ground and build an organic and robust approach to collaboration. While numerous individuals contributed to the process, members of the BSCN Working Group, an inter-disciplinary, cross-institutional group of professionals drawn from the six HOB institutions, are primarily responsible for the outcome. Their extraordinary dedication of time and intellect made this publication possible.

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PART ONE: EXECUTIVE SUMMARY

INTRODUCTION

As the cultural sector continues to expand, evolve and adapt to changing conditions, institutions working in the sector are increasingly turning to partnerships and collaborations to deliver on mission. This is not news. Cultural institutions have been exploring a wide range of community partnerships for several decades, both inside and outside of the sector.[i] In recent years, a new emphasis on "collective impact" has brought energy and discipline to increased collaboration.[ii]

Solving complex social, health and environmental problems requires interdisciplinary cooperation and large-scale interventions beyond the scope of individual organizations.[iii]

At the same time, demographic and cultural shifts in the American population, along with an increased focus on equity and accessibility amongst institutional funders, have raised important questions about how cultural institutions can be more deeply "embedded" in their communities. This has been, and will continue to be, a fitful evolution, as curators wrestle with balancing artistic and scientific ideals with their community's needs and interests.

Demands on cultural institutions to remain relevant and responsive to their ever-changing publics are likely to grow. Increasingly, the extent to which a nonprofit cultural institution is able to leverage partnerships to broaden its reach and accomplish its mission is seen as an indicator of organizational success.[iv] Institutions that learn to collaborate successfully become "nexus workers" in their communities[v] – earning the trust of their stakeholders and building cachet amongst funders.

Much has been written about partnerships and collaborations in the cultural sector,[vi] including partnerships amongst cultural institutions, and partnerships between one or more cultural institutions and social service agencies, school districts, business associations and higher education. We do not aim to summarize or review that body of literature in this paper. Prior to this study, an earlier phase of planning work led by the Institute for Learning Innovation produced a position paper that examines the underlying conditions that both promote and deter cultural institutions from meaningful and systemic community engagement.[vii]

Rather, this paper focuses quite narrowly on a particular kind of collaboration in which consortia of co-located, but dissimilar cultural institutions can forge new capabilities to collaborate through a structured, intentional process. Administrators, board members and funders interested in forging deeper community connections and developing new ways of cooperating with neighboring institutions are the primary audience for this paper. While the lessons learned through the BSCN project may have broader relevance to nonprofit organizations outside of the cultural sector, cultural institutions are the frame of reference for all that follows.

The authors' intention is not to propose a hard and fast method for approaching multilateral collaborations, but rather to convey the many methods and tools used in the BSCN process and offer a candid assessment of what worked and what didn't – in hopes that any part of this work might be helpful to another consortium in search of collective impact.

BUILDING STRONG COMMUNITY NETWORKS

OVERVIEW OF THE BSCN PROCESS

The BSCN process – a community-based approach to collaboration amongst diverse cultural institutions – was initially conceptualized and outlined in a 2011 proposal to IMLS by Heart of Brooklyn, with input from Alan Brown of WolfBrown. The process was significantly refined and better articulated throughout the two-year project based on the experience of the Working Group and based on feedback from a developmental evaluation conducted by John Shibley. The following list of steps might be considered as a menu of options available to consortia of cultural institutions and their partners who desire to cooperate on programming to address community needs. Consortia might borrow or adapt individual components of the BSCN process to strengthen an existing partnership, or start a new one.

1. Installing a Collaborative Team

- Structuring the optimal collaborative team, and appointing the right people
- Providing leadership, and securing appropriate facilitation and support
- Establishing clear expectations
- Hedging against loss of institutional memory from turnover

2. Finding Common Ground

- Conducting a public value audit
- Reflecting on commonalities and identifying priorities
- Learning about each others' decision processes
- Expanding consciousness about collaborative possibilities through case study research

3. Community Research and Listening

- Designing research and "deep listening" efforts
- Enfranchising community stakeholders in the learning process
- Considering participatory research vs. consul-tant-led research
- Capturing and making sense of community input

4. Generating Ideas for Collaborative Programs

- Designing an idea development process
- Accumulating ideas
- Advancing ideas worthy of further conceptualization
- Using committees to turn ideas into coherent programs and projects

5. Prioritizing and Implementing Collaborative Programs

- Subscribing to proposals, and identifying project leaders
- Transitioning to fundraising mode
- Supporting the pipeline moving forward – backbone or no backbone?

Each of these steps is discussed in the second section of the report. Where appropriate, concrete illustrations of practice are provided, along with candid thoughts on what might have been improved.

SUMMARY OF LESSONS LEARNED

It stands to reason that community organizations of all types will be more successful if their programs are informed by a deep understanding of the communities they serve. As museums, libraries and other cultural institutions consider what role they can play in addressing a host of community challenges, more facile and responsive approaches to community engagement are required. In retrospect, the BSCN process can be seen as an operational approach to "embeddedness" – a tactical, step-by-step process through which consortia of co-located but dissimilar cultural institutions find common ground and develop a capacity to listen, respond, and fulfill the promise of collective impact. Many lessons were learned over the course of the two-year initiative – summarized here, and also reflected in the 25 BSCN work products, listed in the Appendix.

overview

COLLABORATION IS A MINDSET

We learned through experience that collaboration is not just a process, but a mindset. The collaborative mindset grows out of knowledge and appreciation for your partners' missions, assets and capabilities. Relationships make collaboration possible. Trust is central. We also learned that collaboration must be goal-focused and mission driven. Collaborations develop when different organizations see that by collaborating they can reach goals that matter to them that they cannot reach alone. **At heart, collaboration is not altruistic. Organizations don't collaborate because it's a good thing to do. They collaborate because it's in their self-interest.** All of this suggests that 1) collaboration takes time, because the underlying relationships take time to develop; 2) collaboration is fragile, because circumstances change and people move on; 3) partners in a collaboration must be sufficiently self-interested; and 4) collaboration is resource-intensive, especially in regards to the time involved in establishing relationships and honoring a collaborative process.

COLLABORATIVE OPPORTUNITIES ARISE THROUGH A NETWORK OF OPEN RECEPTORS

Ideas for collaborative programs may emerge from a methodical prioritization process (such as the BSCN process) based on an analysis of common stakeholders and programmatic priorities, but this is only one source of ideas. Ideas for collaborative programs may be suggested by community members, or may arise from funding opportunities. **All of the partners in a collaborative enterprise must act as receptors for collaborative programming ideas. This requires an openness to community input, as well as a willingness to consider collaboration as an alternative.** We discovered that many excellent ideas for collaborations were not identified or proposed as potential collaborative projects simply because it never occurred to the individual who initially considered the idea. Much like the challenge doctors face in diagnosing a rare disease, the challenge facing collaborators is often "thinking of it in the first place."

FINDING COMMON GROUND

The process of systematically identifying commonalities and overlapping interests across the six HOB institutions in terms of community stakeholders (e.g., teens, caregivers, educators) and topics/issues (stewardship, environmental awareness, accessibility, creativity) was productive – so productive, in fact, that the number of potential areas of collaboration quickly became overwhelming. **The challenge, therefore, was not in finding common ground, but in deciding where to focus.** This is where the development of a tool, 'the funnel', to aid the working group in focus efforts was crucial to the success of this project (see Figure 4, page 49). The analysis of overlapping interests was helpful, but consensus around a small number of potential directions for collaboration emerged from passionate conversations about what really matters.

COLLABORATION BEGINS WITH GOOD DIAGNOSTIC WORK

At the core of the collaborative process is a capacity to diagnose community need through intensive listening, multi-disciplinary analysis, and expansive thinking about collaborative solutions. Without this research and diagnostic work, collaborative project ideas can be inorganic and lack a strong basis in need. **Partners in a consortium looking to collaborate more effectively must fundamentally see themselves as researchers and co-investigators with a set of common learning objectives.** Gathering data together strengthens the bonds between the partners and establishes a common understanding of the problem. Moreover, looking at a community issue or problem through the lenses of multiple institutions representing multiple scientific, cultural and artistic domains provides a much richer analysis. Partners with more experience with a given constituency or issue can step forward and provide leadership.

PROGRAM IDEAS MOVE THROUGH A FUNNEL

Collaborative program ideas need somewhere to go; without some sort of an established process for "catching" and vetting collaborative program ideas, they are likely to disappear. In order to advance towards funding and implementation, collaborative program ideas must pass through a funnel, moving through both strategic and operational gates (i.e., evaluation criteria), in that order (see Figure 4, page 49). To pass through the strategic gate, collaborative program ideas must align closely with mission. **To pass through the operational gate, collaborative program ideas must be timely, financially worthwhile and feasible to implement from a staffing standpoint.**

WORK OUT FUNDRAISING ISSUES EARLY

Competition for philanthropic resources will be an issue with any consortium of cultural institutions that share the same pool of funders. Consortium partners approach the same funders on an annual basis, and rely on their support. This can create tensions between the partners when discussion turns to raising money for new, collaborative projects. Will funders shift monies from individual organizations to collaborative projects? Naturally, partners are unlikely to support collaborative funding proposals that may cause their own slice of a funder's pie to shrink, especially in the current environment of reduced resources. **For this reason, fundraising should be a key consideration throughout the process of prioritizing collaborative programs.**

BACKBONE ORGANIZATIONS ARE A MEANS TO AN END, NOT AN END

The pool of collaborative program ideas represents an agenda for the consortium, and also provides opportunities for other partners outside of the consortium to participate in specific projects. A collaborative process like BSCN needs strong leadership and good facilitation. Backbone organizations like Heart of Brooklyn (i.e., organizations designed to act on behalf of a consortium) can be effective in implementing a consortium's agenda, but must not overreach the consortium's will to collaborate. **When backbone organizations take on a life beyond the imprimatur of the consortium they are supposed to serve, issues of mistrust, competition for resources, over-dependence on key individuals, and lack of sustainability can lead to collapse or radical downsizing.** The optimal configuration of backbone support for a given consortium will depend on the needs, resources and aspirations of the consortium, but must be grounded in a clear agenda that is continuously validated and shaped directly by the individual consortium members.

PART TWO: THE BSCN PROCESS

THE CHALLENGE OF COLLECTIVE IMPACT

The 21st century needs of the community and society, as a whole, are evolving in ways that require a stronger level of active discourse and sustained cooperation among community members and multiple organizations.

Thought leaders in the social sector have identified a need for broad cross-sector coordination as a means to bring about large-scale social reforms.

Museums, libraries, and other cultural institutions with their community connections and cultural assets, are well positioned to lead the way in creating networks to address community needs. To take advantage of this opportunity, however, the cultural sector needs better frameworks and models for collective action to address community needs.

While the instinct to broaden and diversify community impact is present in most cultural organizations, the means to do so is often modest or missing. “Community engagement” is a core part of the value proposition of many cultural institutions, and a platform on which funds are raised. The extent to which community needs and interests are reflected in core programming, however, varies a great deal. Some cultural institutions (e.g., libraries) are by nature embedded in their communities and highly responsive to community needs. Other institutions, especially those with fixed collections and exhibitions that require years of advance planning, can find it more difficult to make community connections around curated programs and experiences that may not always align with community needs and interests.

Cultural institutions contribute enormously to the social capital of their communities, serving as “cosmopolitan canopies” where residents and visitors of diverse socio-economic and cultural backgrounds mingle and share experiences.

This is especially true in Brooklyn, one of the most diverse communities in the US. Focused by its mission and constrained by its resources, each cultural institution in a community contributes what it can to the larger needs of the community – most commonly in the areas of youth and family development, stewardship and neighborhood revitalization.

In a highly decentralized system of program delivery such as the infrastructure of nonprofit cultural organizations in a large city, the community engagement efforts of various institutions provide a virtuous but uncoordinated latticework of programs and activities for a plethora of community stakeholders. Consider, for example, the efforts of numerous arts organizations to individually plug holes in the arts education curriculum in public schools.

Individual institutions, even those with large budgets, cannot be expected to solve complex and systemic social problems, much less surmount the formidable barriers to cultural engagement such as lack of mobility, socioeconomic challenge, disability, language barriers, and stifling social norms. As the scale and complexity of need grows, new methods and tools are required to better coordinate and manage the collective resources of cultural organizations in a given community.

Cultural institutions are increasingly looking to external partners for leverage, often supported by funders eager to see more collaboration. Many cultural organizations getting into partnerships with other nonprofits or commercial businesses experience steep learning curves. In reality, most collaborations are one-off projects to capitalize on a specific funding opportunity or respond to an approach from a well-intentioned community partner.

Sustained collaborative programming amongst consortia of dissimilar cultural institutions is historically rare. Cultural consortia mainly act as communities of practice and work to collectively solve issues related to their members. However, The Balboa Park Cultural Partnership, a large consortium of 27 dissimilar cultural institutions in San Diego, is a model consortium to examine. It was initially developed to address facility and zoning issues common to all institutions. As it grew, the consortium developed a capacity to innovate and manage a range of partnership activities, some of which are internally driven (e.g., realizing cost efficiencies, collaborative research) and others of which are more community-oriented (e.g., joint ticket packages and accessibility initiatives).

Against this backdrop, the BSCN project attempted to design a sustainable process of community collaboration for the six HOB institutions – a well-established consortium that nevertheless sought a better model for serving its community. In short, the BSCN process proved that consortium-based collaboration is a skill that can be acquired and institutionalized through deliberate and sustained effort.

The capacities required to collaborate effectively in a consortium situation include:

1

An ability to recognize opportunities to collaborate in the first place;

2

Diagnostic capabilities – the skills needed to engage the community in a process of reflecting on their hopes and needs;

3

An aptitude for analyzing information through the lens of mission and conceptualizing programs that are both relevant to the community and feasible to implement; and

4

An efficient process for managing a pipeline of collaborative program ideas.

WHAT FOLLOWS IS A BRIEF SUMMARY OF EACH STEP OF THE BSCN PROCESS, ALONG WITH REFLECTIONS ON WHAT WORKED AND WHAT DIDN'T.

1

INSTALLING A COLLABORATIVE TEAM

Jim Collins famously observed that great business leaders "…start by getting the right people on the bus, the wrong people off the bus, and the right people in the right seats." Carefully selecting, structuring and orienting a cross-institutional committee or "Working Group" charged with exploring collaborative program ideas is a critical first step in the long journey towards collective impact. It's quite simple, according to John Shibley, BSCN consultant and evaluator: "You get what you start with."

1.1

Structuring the optimal collaborative team, and appointing the right people

■ Figure 1

A well-structured committee will maximize the likelihood of success and sustainability. The initial design called for a Working Group comprised of two individuals from each partner institution, with each individual representing a different organizational perspective. A good deal of forethought went into these appointments, and a number of possibilities were examined quietly with institutional leadership before invitations were issued. Ultimately, each institution's CEO made two appointments to the Working Group.

The organizational perspectives within the Working Group included education, marketing and communications, community engagement, visitor services, finance, governmental affairs, development and senior leadership. This inter-disciplinary lens allowed for a robust and well-rounded dialogue about community issues and potential programmatic responses. The development perspective was especially helpful in considering the funding potential of different program ideas. As time passed, membership in the Working Group changed. Over the two years, five delegates left the Working Group for one reason or another. In replacing outgoing delegates, the tendency was to appoint education staff. In retrospect, more emphasis should have been placed on maintaining a diversity of professional domains.

It goes without saying that not everyone is well suited to represent an institution in a sustained process of collaboration. Individuals with an openness to new ideas, patience with process, empathy, and openness to critical feedback will excel in a collaborative endeavor. These factors were informally factored into the recruitment process, but might have been more formally considered.

Another dimension of diversity within the Working Group was that of tenure and experience. Several delegates to the Working Group were more senior people with decades of experience and deep knowledge of the community, while others were newer in their jobs and had less community knowledge. While everyone had equal votes in decision-making matters, this diversity of experience allowed for a subtle dynamic of mentoring. In fact, the BSCN project was explicitly designed and facilitated as a professional development and capacity-building opportunity for the Working Group.

At the same time, a Steering Committee comprised of a staff leader from each institution (e.g., directors, deputy directors, vice presidents) was appointed to support and liaise with the two Working Group delegates. While the role of the Steering Committee was necessary in theory, the group functioned largely behind the scenes, meeting only a few times as a group to reflect on the process. In fact, evaluation data surfaced disconcerting ambiguities surrounding the role of the Steering Committee amongst Working Group members, suggesting that a better "lateral" structure was needed (i.e., stronger connections between Working Group members and their respective institutional leaders).

In taking stock of the BSCN process, Working Group members recommended that the Steering Committee and the Working Group should be combined moving forward, but dropping one Working Group representative per institution. This configuration will both maximize the efficiency of the process (one less person per institution) and assure that all decision-making involves a senior staff person from each institution (the Steering Committee member). Maintaining two representatives from each institution proved essential to the process, as one representative could cover for the other when one could not make a meeting. The paired structure also helped to minimize the drain on institutional memory from turnover.

1.2

Providing leadership, and securing appropriate facilitation and support

In designing the Working Group process, the project team discussed the pros and cons of group leadership (i.e., a chair, or two co-chairs). It was decided not to proceed with a leadership structure because it might send a signal to Working Group members that the playing field is not level (i.e., some have more power than others), and that some had to work harder than others. In fact, the leadership void was filled by the team of consultants and Heart of Brooklyn staff (in the first year) and Wildlife Conservation Society staff (in the second year).

It was acknowledged that consultant leadership was a temporary situation, with the clear expectation that leadership responsibilities would gradually transfer from the consultants to the Working Group. This is, in fact, what happened. Over the two-year process, Working Group members assumed a variety of leadership roles – setting agendas, designing research, moderating expert panels, inviting community members into the process, and guiding the work of sub-committees. The role of the lead consultant evolved from one of leadership and heavy facilitation to one of coaching and light facilitation. At times when the process was vulnerable (e.g., when a vacancy occurred, or when lack of attendance at meetings became an issue), BSCN leadership stepped in to assess the problem and work with the partners to ensure continuity.

The Working Group, in its post-grant recommendations (Work Product #25), identified the need for co-chairs to be appointed to staggered two-year terms, such that one of the two co-chair positions rotates out each year. The co-chairs will take responsibility for keeping the BSCN process moving forward, calling meetings, setting agendas, and stewarding the committee programs and ideas. The Steering Committee should appoint the initial two co-chairs (one for a one-year term, another for a two-year term), and then appoint an incoming "Co-chair Designate" at annual intervals, but at least six months in advance of the appointment, to allow time for transition.

Even with co-chairs in place, some level of additional administrative support (e.g. a half-time coordinator position) and "impartial" facilitation is likely to be required to sustain a process like this. In situations where the consortium maintains a backbone organization, this level of support may be provided through the backbone organization.

1.3

Establishing clear expectations

Despite the fact that the six HOB institutions had a 12-year history of cooperating on various programs, there was no precedent for the BSCN process within this group. Consortium committee meetings had become rote and unproductive, leading to questions (mostly unvoiced) about the purpose, autonomy, and strength of the consortium. Thus, there was a fairly high degree of uncertainty going into the BSCN project. The HOB directors had approved the grant applications, but few of the people appointed to the Working Group had been involved in the planning work that preceded the initiative.

Working Group members were asked to make a two-year commitment to a risky process. Establishing clear expectations for the Working Group in terms of meeting attendance, level of effort outside of meetings, communications protocols, purview and accountability was therefore critical. An initial briefing paper helped to clarify the initial process (Work Product #1). Since the process was developmental, however, many details were simply "to be determined."

The Working Group met monthly for two years and was the primary body charged with learning, listening, and developing a collaborative programming agenda. The time involved by Working Group members ranged from 5 to 15 hours per month, perhaps more during periods of concentrated activity. The work consisted mostly of preparing for meetings (e.g., reading reports, articles and materials), discussing BSCN priorities with colleagues, attending Working Group meetings, and occasionally meeting in small groups to discuss a specific issue in an informal setting. In retrospect, the monthly meeting schedule was quite demanding, but also served to coalesce the group and establish a level of familiarity, trust and camaraderie that was central to success.

Communication was managed via email (mostly from the project coordinator, announcing meetings, etc.). Early in the process, it was decided not to force the group to communicate via a third party groupsite, although on several occasions documents were uploaded to Google Drive for collaborative editing. In retrospect, a groupsite of some sort or the use of Dropbox may have been helpful, especially as the process matured, to provide more fluid access to project materials in a timely manner.

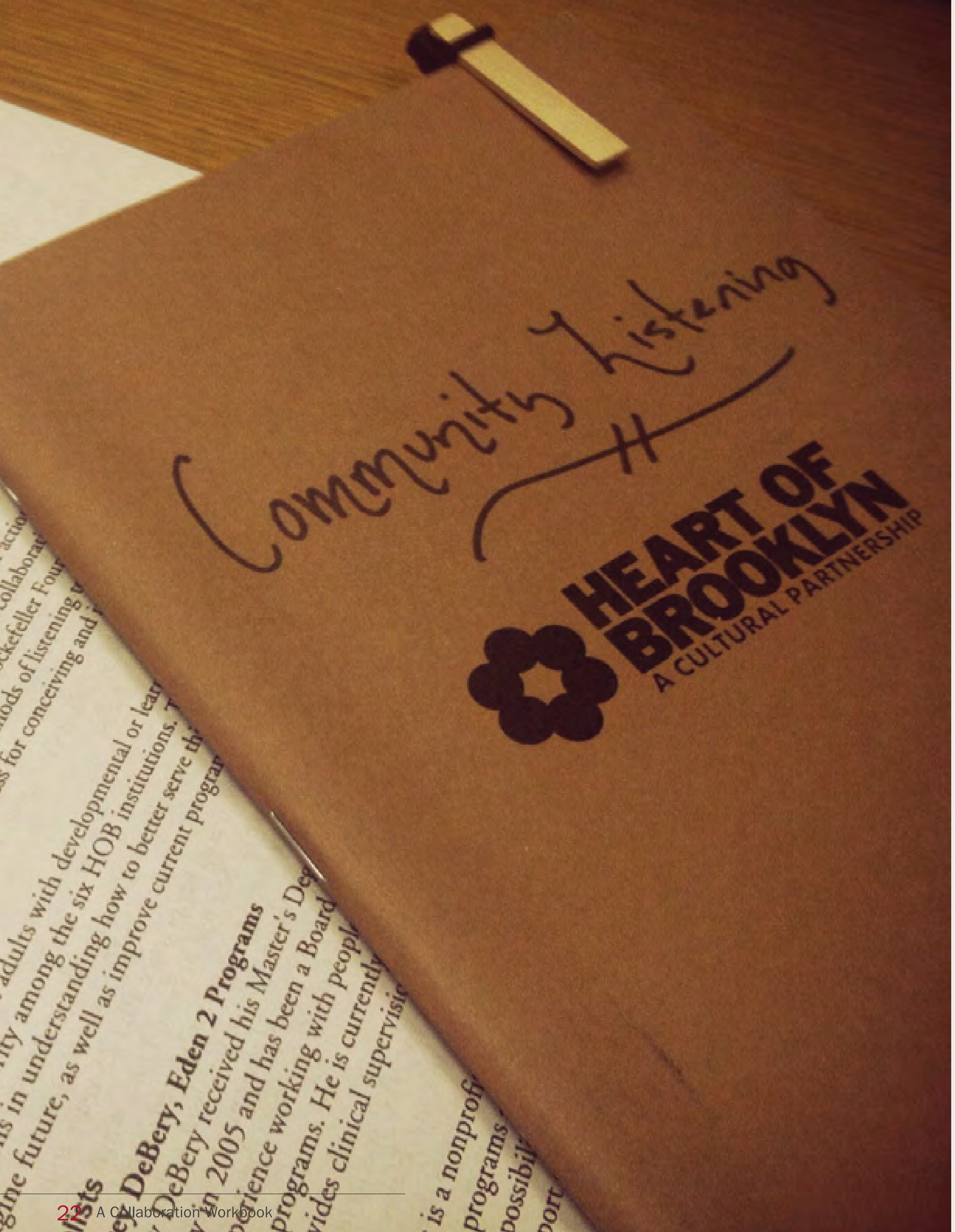
LESSONS LEARNED

A core challenge inherent to collaboration between dissimilar institutions is the variation in the institutions' decision-making processes. For example, some institutions have multi-year, highly structured processes for evaluating program ideas, while other institutions have less formal and less structured decision process. Some partners may be able to make a decision about whether or not to move forward with a collaborative project in several days, while other partners may take weeks or even months, depending on the budget implications. The BSCN process focused mostly on the Working Group, and less on the decision-making process that played out behind the scenes within the respective institutions. At times, Working Group members struggled to get buy-in from senior management within their own institution. In retrospect, more attention should have been paid to exploring and codifying the individual processes within each partner institution.

1.4

Hedging against loss of institutional memory from turnover

More could have been done to reduce the loss of institutional memory due to turnover in Working Group membership. There were five departures and three arrivals, meaning that by the end of the project, two of the six institutions had only one representative on the Working Group. In some cases, turnover was a positive development, while in other cases turnover was a significant setback, as when a high-functioning member left to take another job. The process of "onboarding" new Working Group members was informal and could have been strengthened through a codified process of orientation and induction. A central online site with pertinent documents, along with a formal training would have helped new members access information more efficiently. Despite the lack of a formal transition process, the three new members quickly assimilated into the group and became essential partners. This quick assimilation may speak more to the strength of the new members, than the process. In hindsight, it seems that the ability of a process like this to withstand turnover is a sign of strength (i.e., the process has been institutionalized to some degree) and an indicator of success.



2

FINDING COMMON GROUND

With a strong collaborative team in place, the initiative's focus turned to defining a strong conceptual basis for collaborating and identifying shared priorities. This work is absolutely necessary. By virtue of being co-located, cultural institutions implicitly share a community. But this alone is not a sufficient basis for collaboration. The ability of a consortium to function effectively – especially a consortium of dissimilar institutions – must be rooted in a deep understanding between and amongst the partners as to each other's values, assets, constituencies, history and priorities. This information is often transmitted informally and cannot be obtained from mission statements. With a clear understanding of their "common ground," the partners in a consortium can see opportunities for collaboration that would otherwise be invisible. Without a clear understanding of the commonalities uniting a consortium, however, the players will quickly lose sight of why they are spending so much time in meetings.

2.1

Conducting a public value audit

The idea to conduct a "Public Value Audit" (PVA) grew out of WolfBrown's earlier work with cultural institutions seeking a methodical way of taking stock of their public value. Financial audits are well understood as a regular means of holding people and organizations accountable to financial standards. But financial measures do not indicate the effectiveness with which a nonprofit organization delivers on its mission, or its impact in the community. Some nonprofit organizations produce glossy annual reports that serve an advocacy purpose. But seldom do nonprofit organizations submit themselves to an independent assessment of non-financial outcomes, except in the course of strategic planning. What if nonprofits routinely submitted themselves to public value audits?

The idea of a "Public Value Audit" was adapted to a consortium framework and used specifically as a way of identifying "common ground" in terms of stakeholders and programmatic resources, as well as opportunities to strengthen public value.

New Knowledge Organization, a research institute and partner on the BSCN consultant team, was charged with conducting the PVA in two phases. The first phase of the PVA looked across the existing programs of the partners and produced a collated matrix of stakeholders and program goals (Work Product #3) using a three step process:

- Identifying current forms of community engagement within each cultural institution (i.e., desk research on program offerings, interviews with staff), using a framework for community engagement developed by Institute for Learning Innovation in the earlier BSCN Position Paper;
- Examining intersections among institutions – where they serve common audiences or offer complementary programming (i.e., analysis and group discussion); and
- Defining the institutions' perceptions of community issues/needs they are addressing (i.e., synthesis).

A preliminary report from New Knowledge Organization summarized the initial PVA work (Work Product #6). The second phase of the PVA involved qualitative and quantitative research to evaluate the community's perceptions of how Brooklyn cultural institutions are and could be addressing the four core program areas identified in the first phase of work:

- Programs that support caregivers in raising Brooklyn youth;
- Programs that encourage valuing nature and protecting the environment;
- Programs that support positive youth development; and
- Programs that support the concept of "creative" Brooklyn.

This work included four focus group discussions with HOB stakeholders (discussion participants were nominated by the HOB institutions), two interactive workshops with teens associated with the HOB institutions such as interns or program participants, and an online survey of 880 Brooklyn adults. Working Group members observed the focus group discussions and teen workshops, which proved to be a transformative experience for several of the working group members. The results of this research (Work Products #7, 8, 9) constituted the first wave of "community research and listening" discussed in the next section.

LESSONS LEARNED

Another consortium undertaking this work may or may not choose to approach the challenge of "finding common ground" by conducting a comprehensive Public Value Audit. Regardless, a rigorous analysis of overlapping programming resources, constituencies and issues/topics is central to building a shared understanding of where to begin conversations about collaborating. The precise approach may be simplified. In the end, the collaborators need to have a thorough answer to the question, "What do we have in common that we really, really care about?" Consultants can play a role in facilitating this dialogue, but the understanding must emerge from candid sharing amongst the partners.

2.2

Reflecting on commonalities and identifying priorities

Having gathered information about overlapping programs and interests in the first half of the PVA, the information needed to be condensed into a manageable prioritization exercise for the Working Group (Work Product #4). Working Group members were charged with reviewing lists of shared stakeholders and issues/topics, gathering input from their respective institutions, and rating them. This produced some intense discussions about the definitional differences between "constituents" and "stakeholders" and what language was more accurate. Prioritization scores were calculated and results were distributed (Work Product #5).

Through the lens of stakeholders, the following **three priorities** were identified:

1. Children, youth/teens, and their caregivers (the overwhelming priority);
2. Teachers and educators; and
3. Caregivers of children and adults with disabilities.

Through the lens of issues/topics, **several priorities** emerged:

1. Teaching youth about stewardship of public resources;
2. Conservation – valuing nature (i.e. "healthy planet");
3. Citizenship, community involvement, civic engagement and being a good neighbor; and
4. Developing creativity – giving voice to youth through creative expression.

This was a rather formal prioritization exercise involving a good deal of research, facilitation and a rating exercise. The resulting priorities reflected the strengths, resources, interests, and missions of the six institutions, but were not yet rooted in a strong sense of community need. In fact, the results were a bit overwhelming – multiple stakeholder groups were prioritized and multiple issues were identified – any one of which could consume the group for a year. It was heartening to know that the partners had so many shared interests, but the field of vision needed to be narrowed. In retrospect, some of these priorities persevered through to the end of the grant period (teens, visitors with disabilities), while other priorities were discussed briefly (caregivers, creatives) or tabled completely (teachers and educators), perhaps to live another day.

The prioritization process became less formal as time moved on, possibly due to the strength of the group's working relationship. Teens became the major focus of the first round of community work, and children and adults with cognitive disabilities (including autism) became the focus of the second round of community work. When it came time to choose a topic for the third round of community work, the idea to focus on English Language Learners grew out of a rather informal conversation at a Working Group meeting, and quickly galvanized the group as a common interest.

2.3

Learning about each others' decision processes

Another aspect of finding common ground is building a shared understanding amongst the partners as to each other's decision processes. Knowing whom to call at another institution is one thing, but sustained collaboration requires a fuller understanding of each other's procedures and constraints in making programming decisions. The idea here was to sensitize the Working Group to the realities of each other's internal processes, in hopes that this knowledge would lead to a keener sense of how and when to collaborate.

In hindsight, the original intent was wildly ambitious: build a process map of all six institutions' program planning processes. As discussions progressed about how to approach this work, it became apparent that some of the HOB institutions have many different decision processes that play out on different timelines, across different departments, and with different approval requirements, and that a comprehensive analysis was not feasible. Instead, it was decided to focus on how the six institutions approach making decisions specifically in reference to proposed collaborations.

BSCN consultant John Shibley conducted intensive workshops with staff at each of the six institutions, modeling and testing a process with two institutions, then refining the focus and facilitation process and continuing with the other four. These were spirited discussions and provided the individual groups with an opportunity to step back from their work and talk about the processes by which decisions get made. Several of the groups commented that this was not a conversation that they normally had.

Each institution was provided with an individual report on the substance of their group discussion, as well as a synthesis report on learnings across the Working Group (Work Product #11). This work uncovered important realizations about how collaboration happens: where ideas for collaborative projects come from, how they are ruled out or approved for further consideration based on an initial assessment of "mission fit," and how progressively stricter operational criteria are used to vet the ideas as they move closer to a green light/red light commitment (Figure 3, page 40). Other themes coming out of this work included the need for early prototyping (i.e., fail early and fix it while the cost is low), the need for sufficient "organizational slack" to uvndertake new collaborations, and the likelihood that multi-site experiments with embedded opportunities for cross-site learning lead to better outcomes.

In sum, this exercise proved to be influential in advancing the group's understanding of how collaboration works. It enabled them to move forward in their community work with a consciousness about the process of collaboration that they didn't have prior to the start of the exercise. The services of a highly skilled facilitator with process modeling expertise were necessary and appropriate in leading this segment of the work. After all, a high-functioning collaborative team should really know something about the inner workings of collaboration.

2.4

Expanding consciousness about collaborative possibilities through case study research

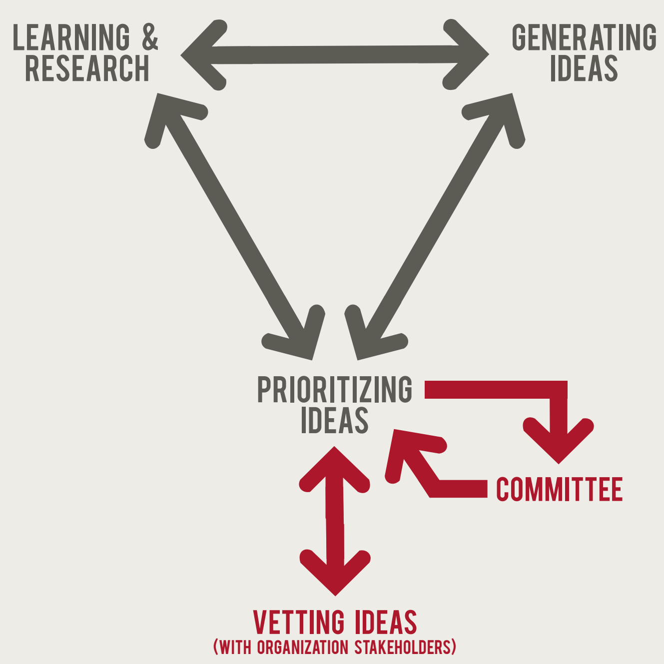
At the time the BSCN project was originally conceived, it seemed prudent to design a learning component that would avail the Working Group of lessons learned from collaborations undertaken in other cities. Many hard lessons about collaboration have been learned by other consortia, and it only stands to reason that we ought not to repeat the mistakes of others.

A case study research effort was therefore included in the first year of the initiative (Work Product #10). Through a nominating process, a list of approximately 53 potential collaborative projects was generated, and six were selected for deeper investigation. This effort was aided greatly by Jonathan Schwart, a student research fellow from the University of Chicago, who conducted most of the research and drafted the six case study narratives. Karen Tingley provided an overarching summary. Working Group members were assigned to each case study and participated in at least one phone call with a key informant. At the national seminar in February 2013, the respective Working Group members presented key learnings from their case study to the assembled group.

On balance, the case study research was not influential in shaping the Working Group process. It came on top of several other significant learning efforts (stakeholder prioritization, decision process modeling), and sufficient time was not available to really delve into the case studies and discuss them in detail. While each of the case studies holds valuable illustrations of effective programming partnerships, that information might have been better introduced later in the process, and only in situations where specific context was needed to better formulate a programming idea.

LESSONS LEARNED

Ideas for collaborative programs may emerge from a methodical prioritization process based on an analysis of common stakeholders and programmatic priorities, but this is only one source of ideas. Collaborative programs may be suggested by community members, often unsolicited, or may arise from funding opportunities. All of the partners in a collaborative enterprise must act as receptors for collaborative programming ideas. This requires an openness to community input, as well as a willingness to consider collaboration as an alternative at the earliest stage of consideration and before an idea is dismissed as infeasible. In reflecting on decision processes within the six institutions, it was discovered that many excellent ideas for collaborations were not identified or proposed as potential collaborative projects simply because it never occurred to the individual who initially considered the idea. Identifying opportunities to collaborate might be likened to diagnosing a rare disease. The biggest challenge is simply "thinking of it."



■ Figure 2

3

COMMUNITY RESEARCH & LISTENING

Many cultural institutions see themselves as stewards of a particular art form or scientific field, but are less comfortable, or less purposeful, in their role as a community leader. Well-established protocols and procedures are used to plan facilities, exhibitions, and programs, although a similar level of rigor is seldom applied to understanding the needs of the community. This is not to say that cultural institutions are out of touch with their communities, or that the public should dictate an institution's programs. Rather, this criticism serves to recognize that institutions with a deep and fluid understanding of their communities can make more enlightened programming decisions that both convey the vision of curators while also recognizing the community's unique needs. A key objective of the BSCN initiative was to enhance and develop the collective capacity of the six HOB institutions to learn about, and diagnose, community need. Over a series of three iterations of research and listening, the Working Group modeled a strong diagnostic process that yielded a continuous stream of ideas for better serving the community.

3.1

Designing research and "deep listening" efforts

At the core of the BSCN process is research and learning. Working Group delegates learned to be savvy consumers of professional market research, and also learned to design more informal, but equally valuable, learning activities such as expert panels and community forums. Having prioritized a particular issue or stakeholder group, the Working Group was then asked, "How can we learn about this issue or group or people?" and "What information do we need to inform our dialogue about solving this problem?"

The first iteration of research and listening focused on teens. In this case, professional researchers (New Knowledge Organization) designed and led the research effort. Teens were engaged in an interactive workshop designed to uncover their concerns, hopes and aspirations about life as a Brooklyn teen. Additionally, Brooklyn residents were surveyed about youth development and the extent to which cultural institutions can work to address youth issues. Several Working Group members observed the teen workshops. The product of this research (Work Product #7) provided input to the group as they considered how to coordinate and expand service to teens.

The second iteration of community research was completely different. Having elected to focus on children and adults with cognitive disabilities (initially, people affected by autism spectrum disorder, but later broadened), Working Group members considered approaches to community listening and settled on an expert panel format. In this case, the Working Group became activated in both the design of the research (i.e., choosing an expert panel format, and nominating panelists) and in conducting the research (i.e., they were asked to provide input on a list of questions to be asked of panelists, and Marcos Stafne of the Brooklyn Children's Museum moderated the discussion). Video documentation is available (Work Product #17). Evaluation data points to this learning exercise as a pivotal event in the BSCN process (Work Product #24).

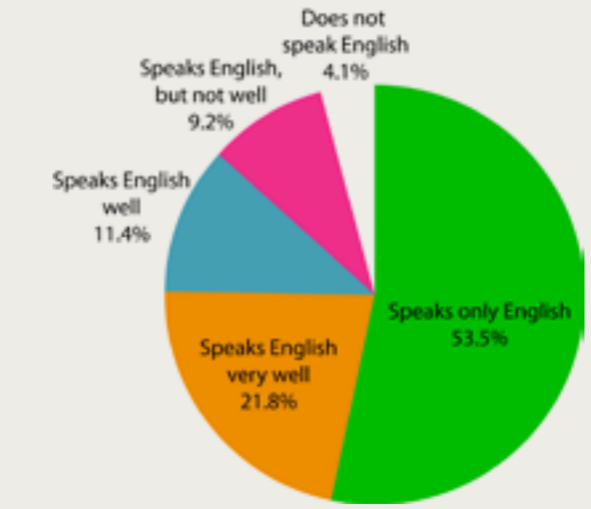
For the third iteration of community listening focused on increasing accessibility to Brooklyn residents who experience language barriers. A mixed method research approach was designed with input from the Working Group. ThinkBrooklyn, a nonprofit research center led by Gretchen Maneval, prepared a customized demographic analysis, drawing on data from the US census and other sources. The demographic analysis helped to establish the dimensions of the challenge. For example, nearly 40% of Brooklyn adults are foreign born, and 10% of Brooklyn's foreign born don't speak English at all. Some language communities are clustered in specific areas of Brooklyn, while others are more dispersed. Following the demographic analysis, representatives of different language communities in Brooklyn exchanged views on the underlying cultural issues and other barriers affecting attendance at cultural institutions. Video documentation of this community listening event is available in three segments (Work Product #18). Again, the Working Group was involved in both designing and conducting the research. Panelists were proposed by the Working Group. The community forum was moderated by Meredith Walters of the Brooklyn Public Library, and the entire Working Group was asked to review the discussion protocol and contribute questions. Immediately following the forum, all participants assisted in summarizing key learnings in a facilitated discussion.

In general, these community listening events required a good deal of project management work by the BSCN coordinator, but didn't cost much in terms of hard expenses. Ironically, the least expensive research (i.e., the expert panel on autism) produced the greatest impact for the Working Group in terms of catalyzing ideas for collaborative programs. The care with which these events were designed and implemented, and the involvement of the Working Group at every stage, strengthened the learning that emerged. The only role that the consultant did not relinquish was that of designing the discussion protocols and some light facilitation.

In retrospect, it might have been helpful to Working Group members early in the process to do some exercises around designing research. For example, when does it make sense to use quantitative methods? What range of qualitative methods might be used to explore community needs? In subsequent iterations of community listening, the Working Group will need to explore a larger toolkit of listening methods, such as ethnographic interviews, observational research, family events in neighborhoods, consultations with experts, etc.

Brooklyn Language Barriers

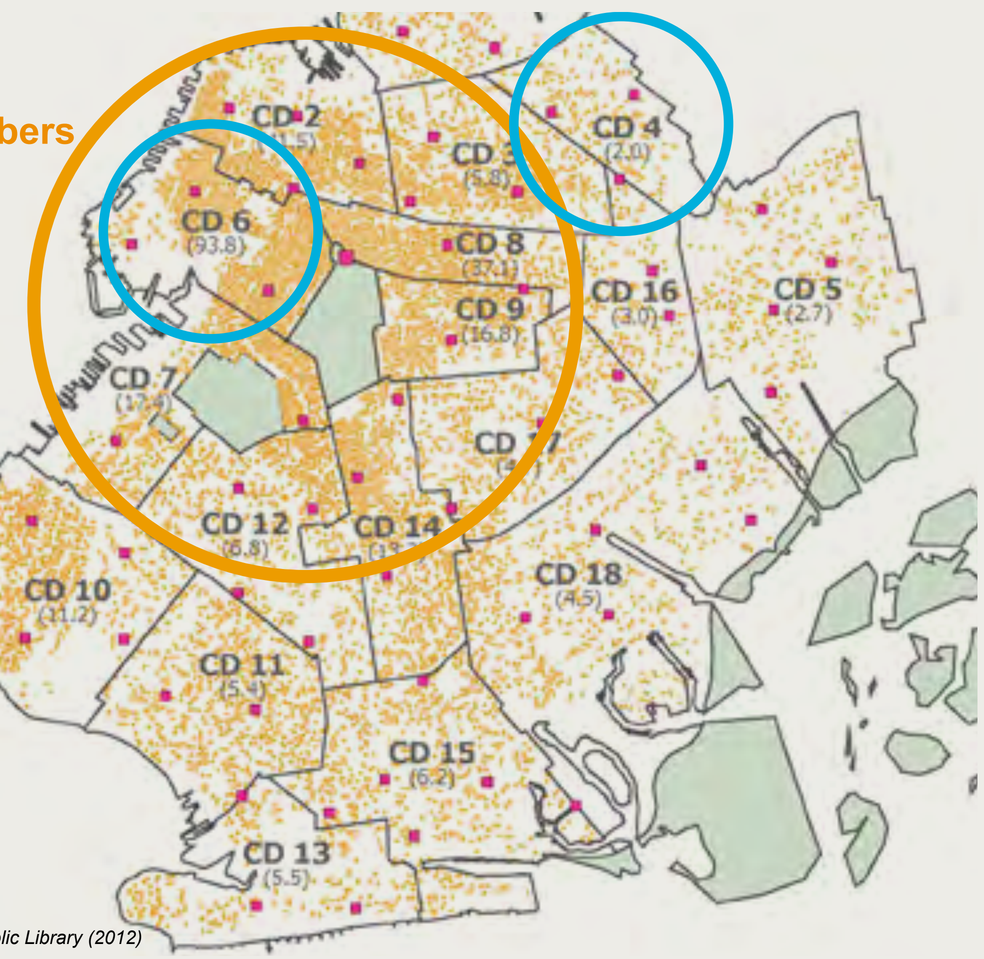
Ability to Speak English



Data Source: American Community Survey 3-Year Estimates (2009-2011)

• **Heart of Brooklyn Members**

36,273



Prepared by ThinkBrooklyn

Data Sources: Heart of Brooklyn (FY 2011), Brooklyn Public Library (2012)

3.2

Enfranchising community stakeholders in the learning process

As the BSCN process illustrated, there are many approaches to learning about one's community. In fact, cultural organizations are constantly learning about their communities in some fashion, whether through informal observation of visitors, community meetings, or unsolicited feedback. Bringing more structure to the institutional learning process might seem like a big leap, but it's really just a small step from the information gathering that most cultural institutions do on a regular basis. We are all researchers on our own behalf, although we go through stages of realizing just that.

The panelists invited to participate in the two BSCN community listening events were eager to cooperate. They were not paid, although gift bags were provided. Almost everyone who was invited accepted. Inviting them to share their knowledge and expertise signaled that the Heart of Brooklyn institutions value what they know, and signaled to their communities that Heart of Brooklyn is open to their input. Many panelists expressed a desire to continue the conversations begun at the listening events.

The multiplicity of viewpoints amongst the panelists was a critical factor in making these conversations as interesting and productive as possible. Time spent briefing the panelists in advance helped to minimize unnecessary time spent covering background information at meetings and allowed for more substantial discussions.

Involving community stakeholders in a learning process is both risky and rewarding. The conversation needs to be setup properly, or community representatives can misinterpret the research forum as an advocacy opportunity. Furthermore, the institutions hosting the conversation need to be honest and up-front with stakeholders about what actions, if any, will come out of the conversation, so as to avoid implied commitments to implement new programs.

On the positive side, involving community stakeholders in a learning process was a first step in opening up new conversations and potential partnerships. In retrospect, the stakeholder focus groups, teen workshops and community forums reflected many of the well-established principles of "action research" in the social service sector – an approach to learning in which the research itself is designed to help address the issue at hand.

3.3

Considering participatory vs. consultant-led research

Cultural institutions tend to seek outside help with market research, believing that specialty skills are required to produce rigorous and useful results. Of course, research can be technically involved and does require professional guidance on some level. But a great deal of learning can be accomplished by professionals working in the cultural sector who are not trained researchers. So-called "participatory research," when designed with care and guided by appropriately skilled researchers, brings significant value to the participants. When staff members are involved as co-investigators in a study (particularly in qualitative research using interviews, focus groups and community forums), the results carry a resonance that is not possible when findings take the form of a report prepared by an outside consultant. This was certainly the experience of the BSCN Working Group.

Participatory research requires time and a good deal of coordination, but can be highly effective as a learning technique, especially in consortium situations where a number of partners need to advance simultaneously through a learning process. In future iterations of community listening, the Working Group might get progressively more involved in conducting research, with the potential to delve deeply into issues and communities of interest through scalable participatory research.

LESSONS LEARNED

In a consortium situation, some members of the group will have more knowledge about specific issues than others, and can step forward to play a leading role in the research. Moreover, some staff members of cultural institutions do, in fact, have advanced research skills and can add greatly to the design and conduct of research. During the BSCN project, this occurred several times, such as when Marcos Stafne of the Brooklyn Children's Museum stepped forward to moderate an expert panel on autism, a subject with which he was quite familiar.

3.4

Capturing and making sense of community input

The Working Group was quickly overwhelmed with professional research products at the beginning of their second year of work, having received lengthy and technical reports on the teen workshops, stakeholder focus groups and quantitative survey results. In retrospect, the volume of research mapped out in the original BSCN scope of work was too much – research on caregiving, research on creativity, research on environmental awareness, and research on youth development. While this research (Work Products #7, 8 & 9) may pay dividends into the future, the overall process would have benefited from a more focused approach to community learning. The research priorities emerging from the public value audit were quickly taken into a professional research effort, in hopes of front-loading the BSCN process with a strong grounding in community research. In hindsight, research priorities and the deliverables should have been set by the Steering Committee and Working Group and focused more on a manageable set of learning objectives that directly related to priority issues and programs. This would have not only saved both time and money, but increased institutional support as the projects progressed to the program funding stage.

Making sense of community data – whether qualitative data from a panel discussion, quantitative data from a survey, or a combination of methods – is a core skill that the members of any consortium must develop. Interpreting data in a group setting can be highly productive when group members share different interpretations of the same data, although this conversation needs to be facilitated. It was not practical to ask Working Group delegates to listen to recordings of community forums, given the time involved, and their availability to read research reports and consider implications outside of scheduled meetings was quite limited. The most opportune moments for synthesis occurred immediately after the community forums, while the information was fresh in their minds.

In the case of the expert panel on autism spectrum disorder, a month passed between the time of the panel and the Working Group meeting during which delegates discussed what they learned. Key takeaways related to the complexity and variability of autism spectrum disorder include barriers that children and adults with autism spectrum disorder experience when visiting cultural institutions, the need for additional staff training, the need for programming that is appropriate for visitors of all abilities, and strategies for mitigating the stressors that can be overwhelming to visitors with autism spectrum disorder (e.g., long lines, distracting stimuli). This also led to an interesting discussion about the supportive role that non-disabled visitors can play in making cultural institutions more accessible to visitors with disabilities.

In the case of the community forum on emergent bilingualism and language barriers, Alan Brown facilitated a synthesis discussion as part of the agenda, immediately after the forum (Work Product #18, part three). Participants reflected on all of the information presented and collectively discussed ways to better meet the needs of Brooklyn's various language communities. This allowed the community representatives to participate alongside the Working Group in pulling themes out of the data. The resulting ideas were captured and revisited a month later in the Idea Lab session (see section 4.1).

Both of these approaches yielded a good synthesis of the key ideas that surfaced in the community listening events. However, we suggest that an initial attempt at synthesis should follow immediately after a community listening event, to capture key ideas before the group breaks for a month. With the benefit of time and perspective, the group can revisit the material later having already engaged in an initial synthesis.

Ideally, new information has time to reverberate, and individual thinking precedes group thinking, so that everyone has an opportunity to formulate opinions and all voices can be heard. In retrospect, the diagnostic process might have been strengthened if Working Group members had met informally in small groups to reflect on what they heard. In reality, a very limited amount of time is available to interpret data in a group setting, and sometimes this process must be truncated.

In sum, diagnosing community need is a necessary step in building a capacity to collaborate with the community and each other. When six institutions apply their diverse knowledge and expertise to a diagnosis, the quality of the analysis can be excellent. The resulting perspective on the "problem" can quickly lead to a productive discussion about programmatic interventions. While it would have been possible to delve much deeper in these investigations and gather a good deal more data, the economy of the investigation was key – gathering just enough data to have an informed discussion.

4

GENERATING IDEAS FOR COLLABORATIVE PROGRAMS

Out of the community research flows a very natural dialogue about potential programmatic solutions to the problem or issue at hand. Initially, the diagnostic process (i.e., making sense of the community research) and the idea-generation process were thought to be separate and sequential. In fact, we learned, they are necessarily intermingled.

4.1

Designing a workable ideation process

Near the end of the first year, the Working Group was drawn into a discussion about what kind of process they wanted to use for generating ideas, filtering them, and then progressively vetting them to the point of implementation. In a sense, this sequence of steps resembles the product development process in many businesses. Ideas for new products arise from developmental research and move through a product development pipeline. The analogy of a "pipeline" (or funnel) through which program ideas flow was helpful in explaining the Year 2 Working Group process (i.e., in the corporate sector, a full pipeline of new products motivates investors and signals a bright future for the company).

Of course, a well-articulated process with a strong basis in theory is preferable to a poorly designed process. In approaching this work, however, the BSCN leadership team was sensitive to the need to continually simplify what was already a complicated process and fight the urge to over-conceptualize. There are well-developed ideation processes in the corporate sector, such as those used by the design firm IDEO. The Working Group expressed a desire for a democratic and straightforward process that valued everyone's input. With this in mind, a preliminary process was defined with the clear expectation that it would be evaluated and improved along the way.

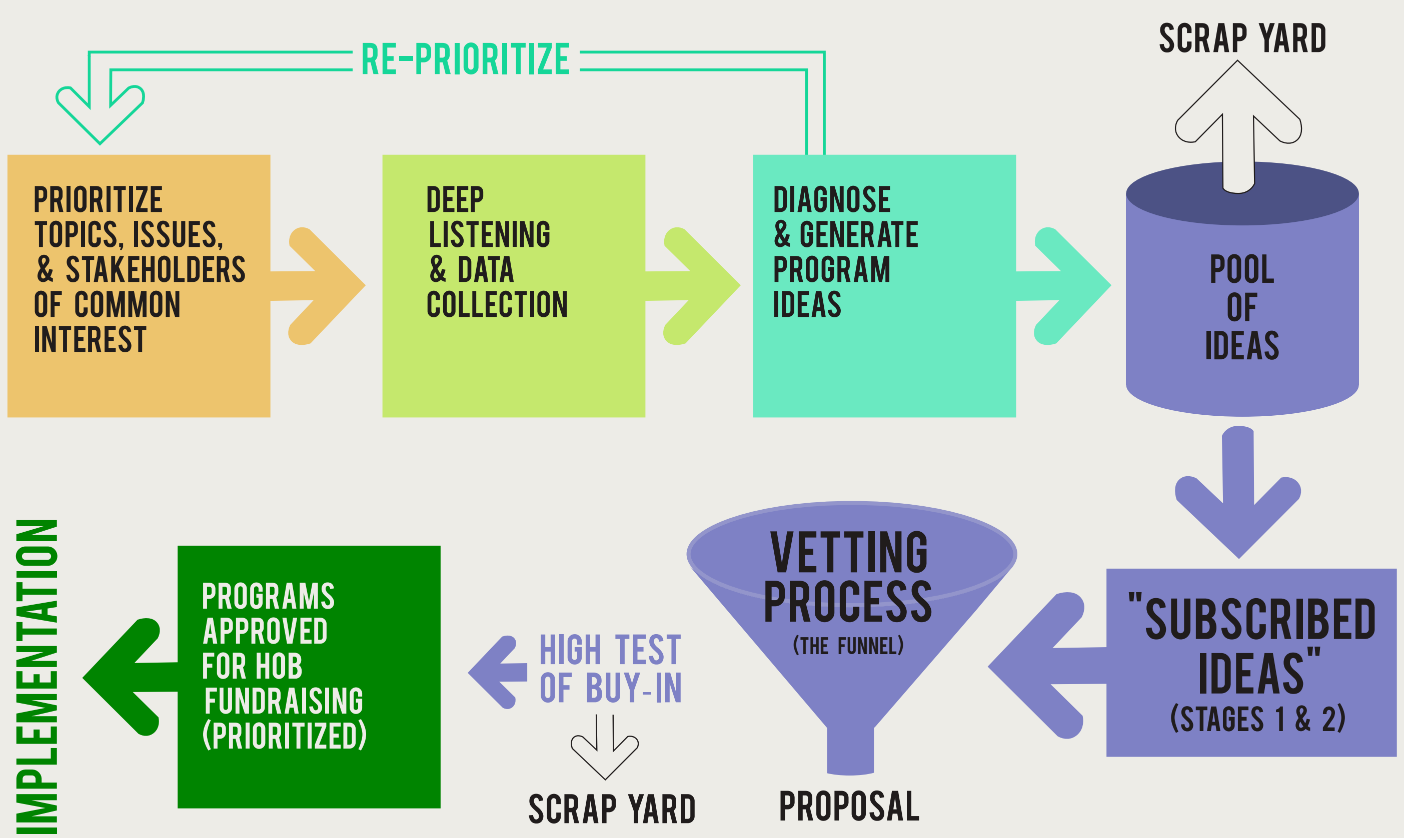


Figure 3

The concept of an "Idea Lab" was proposed in the original scope of work as a pivotal moment in the BSCN process when information gathered from the community is interpreted through the lenses of institutional mission and priorities, and ideas for collaborative programs are hatched. This intensive process might be likened to a chef's kitchen – raw ingredients go in (i.e., research findings, institutional priorities, and personal contexts), and ideas for collaborative programs come out.

The Idea Lab meeting format consisted of a few simple steps:

1. In advance of the meeting, Working Group members were asked to meet with others in their institution to reflect on the topic and begin to generate ideas for collaborative programs.
2. At the meeting, Working Group members were first instructed to work individually and write down up to three key observations from the research.
3. Then, a facilitator led the group through three questions, capturing input on chart pads:

❍ *What key points did you take away from the research?*

❍ *Based on what you heard/learned, what do these communities need from the HOB institutions?*

❍ *What is mission-critical to your institution about service to [this constituent group]?*

4. Then, the group broke into three subgroups (each with three or four people representing different institutions) to brainstorm potential collaborations, with the following instructions:

You have 30 minutes to discuss the implications of the listening session. Three questions are provided to precipitate your discussion. To begin, select a spokesperson for your group, who will report back to the larger group. Take notes to capture your ideas.

Questions to discuss:

❍ *What expertise, resources and programs can your institution bring to this challenge?*

❍ *What expertise, resources and programs do you lack, that you need to access or acquire in order to address this challenge?*

❍ *How might your institutions collaboratively work to better meet the needs of these communities?*

5. Following the small group discussions, a representative from each group shared the group's ideas, which were collated on a chart pad by the facilitator.

Generally, this process took anywhere from 90 to 120 minutes. Working independently, the subgroups often generated similar program ideas, such as when two out of three subgroups proposed that the six HOB institutions should coordinate staff training programs to increase sensitivity to the needs of visitors with cognitive disabilities.

4.2

Accumulating ideas

The facilitator's chart pad notes, along with narrative notes taken by the BSCN coordinator, represented the output from each Idea Lab. Originally, it was hoped that time would permit an initial prioritization process at the end of the Idea Lab, but this proved impractical. The idea generation process was engaging but exhausting. Moreover, it seemed that the cooperative spirit of brainstorming would be violated if ideas were tossed out at this early stage. Thus, the raw output from the Idea Lab needed to be sorted out afterwards and formulated into a list of collaborative program ideas for the group to review at a subsequent meeting. The facilitator took on this work, although a member of the Working Group could just as easily have done it.

Having spent a number of months learning about each other, absorbing research, and designing a collaborative process, the Working Group was anxious to get some concrete ideas for collaborative projects on the table. In fact, the group was prolific in generating ideas. The container for all of the work to come out of the Idea Labs was a document called "The Pool of Ideas." With each Idea Lab, a new portfolio of ideas for collaborative programs was added to the pool. By the end of the grant period, the Pool of Ideas (Work Product #16) incorporated 18 separate program ideas for addressing a variety of community needs. For example:

Constituent Group: Caregivers of Brooklyn's Children and Youth

Program Idea #1: The six HOB partners would collaborate on the design and testing of an orientation program for caregivers, focusing on how to "use" the six HOB institutions to enrich caregiving. The program might include live events (e.g., quarterly receptions for caregivers at different HOB institutions) and electronic and printed information such as "itineraries" for caregivers of different types of people (e.g., young children, seniors).

Rationale: Caregivers are the primary educators and creative nurturers of youth, and therefore play a pivotal role in the future of Brooklyn and its cultural institutions. However, the public value audit research suggests that many caregivers feel inadequately prepared. HOB can provide caregivers with better access to information about cultural offerings and help to educate caregivers as to the educational, social and health benefits to children of engaging in a wide range of cultural activities.

The Pool of Ideas document is the hard-won product of an organic, collaborative diagnostic process – a living document that reflects the shared aspirations of the HOB consortium to better serve its community. In the subsequent vetting work, only a small number of these ideas were selected for advancement to the fundraising and implementation stages. Many excellent ideas remain in the pool for consideration at a later date. Its contents may grow and change based on the will of the consortium to continue the diagnostic process. By the end of the two-year grant period, the Working Group felt that the Pool of Ideas was sufficiently full and that the next phase of work should focus on bringing some of the ideas to fruition, before swelling the pool with more program ideas.

LESSONS LEARNED

As the BSCN process unfolded, the Pool of Ideas for collaborative programs grew and grew, and became "proof" that the process was yielding a steady stream of useful ideas for supporting and engaging the community. In retrospect, the Pool of Ideas might have been circulated more widely, both within the HOB institutions (to get further input) and with community stakeholders and perhaps even prospective donors and funders, with an invitation:

"This is our collective agenda for community engagement. Which programs would you like to support?"

4.3

Advancing ideas worthy of further conceptualization

With a sufficiently large and energizing list of potential programs, the Working Group turned its attention to the necessary business of setting priorities. A "Pipeline Management Meeting" format was designed to take stock of the pipeline of program ideas. The first pipeline meeting focused on just a few ideas, since there wasn't much in the pipeline. But as the pipeline filled up, the agendas for these meetings became more complex. By the third pipeline meeting, the Working Group was managing a portfolio of program ideas in various stages of development.

The first stage in the vetting process was a group discussion about which of the raw ideas in the pool, if any, should be advanced to the next stage of conceptualization. Working Group members were asked to review the Pool of Ideas with their institutional colleagues prior to the pipeline meeting, and come to the meeting with a general sense of their institution's level of interest in advancing any or all of the proposed ideas. At the meeting, a substantive discussion of the raw ideas ensued. In some cases, the group decided to bundle together a number of individual ideas for further consideration, rather than voting on the individual ideas. For example, the group decided to bundle together four separate ideas for engaging teens: 1) a teen leadership council; 2) an annual teen "summit" event; 3) a multi-site, multi-disciplinary teen curriculum or certificate program; and 4) a transportation subsidy program to lower barriers to access.

The group was asked to vote on which ideas (or bundles of ideas) deserved to be further conceptualized. If at least three out of six institutions voted "yes," then a subcommittee would be established to incubate the idea and turn it into a proposal. A "yes" vote represented a commitment of staff time to participate in a small number of subcommittee meetings to flesh out the program idea and ultimately produce a written proposal. No financial resources were committed at this stage. The commitment threshold was intentionally kept low, as the ideas were still raw in nature and needed a good deal more thought.

At the first pipeline meeting, four of the six institutions voted to advance the bundle of teen ideas, while none of the institutions voted to advance the ideas for improving support to caregivers. The group felt more comfortable advancing their collective work with teens, building on their familiarity and success with the Brooklyn Cultural Adventures Program (BCAP). The caregiver ideas would not be discarded, but remain in the pool.

At the second pipeline meeting, all six institutions voted to advance two of the five ideas for increasing service to visitors with cognitive disabilities: 1) establishing a community of practice amongst Brooklyn cultural institutions; and 2) consolidating and improving staff training resources. At the third pipeline meeting, five out of six institutions agreed to move forward with one idea for expanding accessibility to English Language Learners – a multi-site partnership with several existing academic programs through which multi-lingual interns from different cultural backgrounds would work to deepen relationships between the HOB institutions and different language communities around Brooklyn. This project bypassed the subcommittee process because new financial resources would not be required to implement it. A proposal was written by one of the Working Group members, adopted by the other four partners, and moved immediately into implementation.

4.4

Using committees to turn ideas into coherent programs and projects

Two "Idea Committees" were appointed to further conceptualize program ideas: a teen committee and an access committee. Their job was to produce a workable proposal for the Working Group to consider for further advancement. Each of the institutions that voted to advance an idea to committee was asked to appoint one or two individuals from their institution to the committee. In one case, a community member (e.g., a panelist from one of the community forums) was invited to participate in the Idea Committee to give voice to the community. To assure some continuity and focus, at least one member of each committee was a Working Group member.

Prior to meeting, each committee was provided with a brief memorandum explaining their charge (Work Products #19 and #21). The committees did not have leaders, although leaders tended to emerge naturally in the course of discussion.

The first collaborative program idea to reach the proposal stage was the idea of a cross-institutional teen leadership council, and a pilot implementation of a borough-wide teen summit. But the first draft of the committee's proposal was rejected by the Working Group as not having sufficient clarity. In retrospect, the Working Group realized that a better consensus was needed as to what a "proposal" should look like. The BSCN leadership team subsequently developed a template, which was provided to the committee. With this clarity, the teen committee met again to flesh out their proposal (Work Product #20).

Similarly, the access committee met several times to develop a proposal to establish a community of practice around meeting the needs of visitors with cognitive disabilities, and to explore how the six institutions might collaborate on training (Work Product #22).

In sum, the idea generation process was fruitful. The Working Group was creative and prolific in generating ideas. A simple procedure was developed for selecting ideas and delegating them to committees for further conceptualization. The "Pool of Ideas" remains a valuable asset to Heart of Brooklyn, and contains the seeds of a long-term agenda for collaboration.

LESSONS LEARNED

The decision not to advance an idea at the first pipeline meeting was critical, in that it dispelled the presumption that everything had to move forward. In consortium decision situations, some members may feel pressured to vote in favor of projects that their peers are enthusiastic about. A "no" vote is as important and legitimate as a "yes" vote. In several instances, an institution was enthusiastic about an idea, but couldn't realistically commit staff time to the subcommittee process. It is essential to the integrity of the BSCN process that the partners are not coerced, however subtly, into voting for a project.

5

PRIORITIZING AND IMPLEMENTING COLLABORATIVE PROGRAMS

As program ideas moved through the BSCN process, commitment thresholds were intentionally kept as low as possible. This encouraged exploration and conceptual development of a wide range of collaborative program ideas while also providing the partners with multiple opportunities to opt out. A multi-stage vetting process also recognizes that ideas need time to evolve and improve, and also recognizes that partners' commitment to a particular idea may wax or wane as the idea takes shape, and as progressively stricter institutional criteria are applied.

From John Shibley's earlier report on decision-making in regards to collaborative projects, it was learned that collaborative program ideas must pass through two "gates" on their way to approval within each of the partner institutions:

The strategic gate

Collaborative program ideas, once articulated, must initially pass through a strategic gate. At this stage, each partner must decide if the program is sufficiently aligned with mission, and if it is a high enough priority such that allocations of staff time are warranted to further develop the program idea into a fundable proposal.

The operational gate

As the program takes on a more detailed shape, the partners must decide if it is practical for them to participate in implementation, if funding is secured. At this stage, financial criteria are applied (i.e., can we afford to get involved), timing issues are considered (i.e., does it make sense given everything else that is going on), and the project is evaluated in relation to current workload (does the organization have sufficient bandwidth to implement, should funding become available).

The metaphor of a funnel is useful in thinking about this process; fewer and fewer ideas make it through the funnel as more stringent filters are applied. This was the general experience of the Working Group, although there were a few cases in which a partner signed on late in the process, after passing on an idea at an earlier stage. The funnel is also helpful in minimizing the emotion that can cloud decision-making, and in cutting through the haze of enthusiasm that tends to greet each new idea. The two gates represent internal thresholds for each partner considering whether or not to sign on to a collaborative project. But two additional gates should be considered from a group perspective:

Does this program idea meet a high "fit" test for collaboration (i.e., is this a program that can only be done collaboratively, and cannot be done by individual institutions acting alone)?

This should be considered as early as possible in the assessment process.

Does the program idea have sufficient leadership from within the group of partners to propel it through a fundraising process?

While many partners may be interested in implementing a program if it is funded, the real litmus test is whether it is important enough to garner one or two leaders or "champions." This is not just a matter of institutional alignment, but one of personal passion. Without at least one passionate leader, an idea is likely to wither on the vine. With these frameworks in place, the Working Group considered three proposals for collaborative projects.

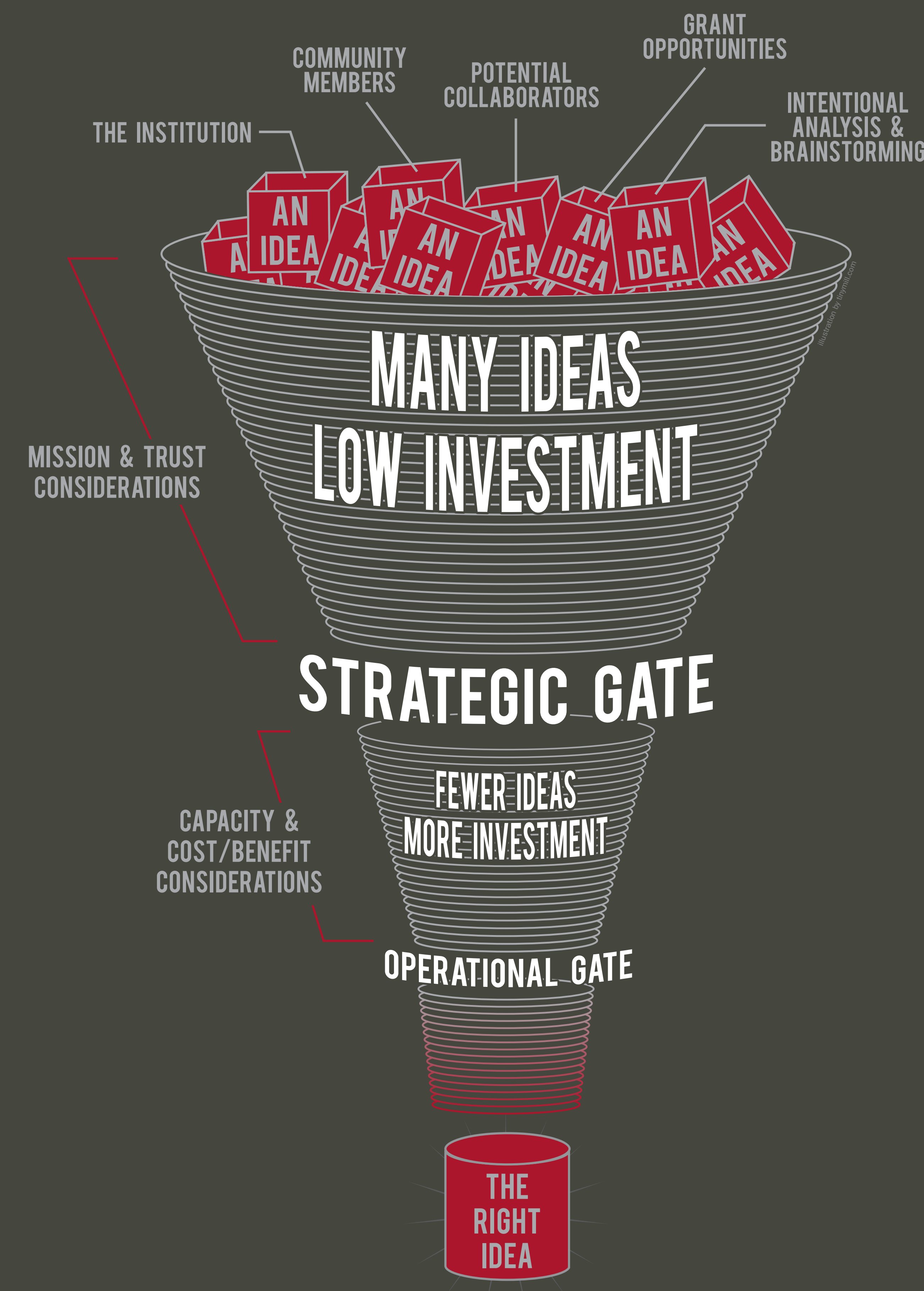


Figure 4

5.1

Subscribing to proposals, and identifying project leaders

Proposals prepared by the sub-committees were taken back to the Working Group for a formal vote as to whether or not to advance the proposal to the Steering Committee for approval. At this point, each institution had to decide whether or not to "subscribe" to the proposal. This represented a commitment to lend the organization's name to the proposal as a partner in the project (i.e., in funding proposals), and a commitment to participate in the program's implementation if funding is secured.

By September 2013, the Working Group had recommended two proposals to the Steering Committee, the teen proposal (Work Product #20), and the access proposal (Work Product #22), and had moved forward with a third project to coordinate multi-lingual internships focused on engaging English Language Learners (Work Product #23), which did not require new resources to implement. As part of the process of gathering internal approvals to subscribe to a proposal, Working Group members were also asked to indicate if their institution would like to take on a leadership role. Project leaders (or co-leaders) would take responsibility for preparing grant proposals and seeking funding, and, if successful, would serve as the grantee and fiscal agent for the project, for which they would receive an allocation of overhead funds.

At the end of the two-year grant period in October 2013, the teen proposal had four subscribers, and the Brooklyn Museum and the Brooklyn Public Library had agreed to be co-leaders of this project. The access proposal had four subscribers, and would be led by the Brooklyn Children's Museum and Prospect Park Zoo. The multi-lingual internship program also had four subscribers, with the Prospect Park Zoo leading the project. The Steering Committee and Heart of Brooklyn Board of Directors had enthusiastically received the two recommended proposals, but deferred a decision pending resolution of other matters that would clear the way for full adoption of the BSCN process.

Heart of Brooklyn, a consortium of six institutions, had previously operated according to the "rule of four" – any project must have the endorsement of at least four out of the six partners in order to move forward as a consortium project where all members would have to participate. In reality, this meant that all six institutions were more or less expected to participate in every HOB initiative. According to some, this resulted in a degree of ambivalence towards the partnership on the part of partners who were not sufficiently staked in the consortium's programs.

Following the closure of the Heart of Brooklyn office in early 2013, the "rule of four" was openly questioned. As the BSCN process evolved, it became apparent that a minimum requirement for a certain number of partners was neither necessary nor desirable for a project to move forward. If, by the end of the vetting process, only two or three partners were subscribed to an idea, there is no reason why it shouldn't move forward, given that the partners, themselves, were responsible for fundraising and implementation (as opposed to a backbone organization representing shared resources).

5.2

Transitioning to fundraising mode

In the distributed leadership model discussed in the preceding section, consortium partners coalesce organically around project ideas. As leaders emerge to take responsibility for shepherding projects through the fundraising process, funding proposals will proliferate. This is likely to result in a new series of uncoordinated funding solicitations that could be disruptive to funders and destabilizing to their grantees. These issues began to arise as the BSCN process yielded viable proposals and talk turned to funding them.

Competition for philanthropic resources will be an issue with any consortium of cultural institutions that share the same community and the same pool of funders. Some of the consortium partners approach the same funders on an annual basis, and rely on their support. This can create tensions between the partners when discussion turns to raising money for new, collaborative projects. Will funders shift monies from individual organizations to collaborative projects? Naturally, partners are unlikely to support collaborative funding proposals that may cause their own slice of a funder's pie to shrink, especially in the current environment of reduced resources.

For their part, funders can reduce anxiety by inviting proposals from consortia or assuring individual organizations that their funding prospects will not dim by virtue of their participation in funding proposals for collaborative projects. Just as museums, libraries, and other cultural organizations collaborate to bring forward programs that address community needs, funders might similarly collaborate on supporting programs that grow out of such collaborative processes. The ideal situation for any consortium will be finding donors who are willing to support whatever programs and projects emerge from the collaborative process. This might seem idealistic, but there are numerous examples of foundation funders and individual donors in cities across the US who prefer to support collective efforts to build community, rather than programs offered by individual institutions. In a way, the entire BSCN process was designed to ensure that collaborative programs are not driven by funding opportunities, but by the consortium's methodical assessment of community need.

LESSONS LEARNED

Fundraising should be a key consideration throughout the process of prioritizing collaborative programs. Development directors within each institution should be brought into the conversation as serious proposals begin to take shape. Decisions to "subscribe" to proposals should be made in consultation with senior staff, including development staff, especially when a partner offers to lead or co-lead the project. Specific approaches to individual, corporate or foundation funders should be discussed as early as possible, to identify conflicts or sensitivities as far in advance as possible.

5.3

Supporting the pipeline moving forward – backbone or no backbone?

According to Kramer and Kania (2011), "Creating and managing collective impact requires a separate organization with staff and a specific set of skills to serve as the backbone for the entire initiative and coordinate participating organizations and agencies." Other writers have extolled the virtues of backbone organizations, defining their roles as "guiding vision and strategy, supporting aligned activities, establishing shared measurement practices, building public will, advancing policy, and mobilizing funding."[1] But, under what circumstances are backbone organizations necessary? Can backbone organizations actually become impediments to collaboration?

The Heart of Brooklyn closure in early 2013 forced the BSCN leadership group to consider the pros and cons of a backbone organization to support collaboration. The Working Group and Steering Committee were thrust into a somewhat ironic situation in which a previously functioning backbone organization with its own staff, programs, and funding relationships had ceased to function in the middle of a two-year effort to develop a stronger process for collaborating. Would the consortium collapse entirely without a backbone organization? Or, was it possible that an even stronger model of collaboration would replace the centralized backbone model?

The two-year funding provided by IMLS and The Rockefeller Foundation allowed for an unplanned "before/after" experiment with two models of backbone support. In the first year of the initiative, support was provided by a fully staffed backbone organization (Heart of Brooklyn). In the second year of the initiative, support was skeletal by comparison: one full-time coordinator embedded in one of the six member institutions, a Principal Investigator with a full-time job, the volunteer President of the Heart of Brooklyn Board of Directors, and two consultants.

According to evaluator John Shibley (Work Product #24), the Working Group found this second configuration of support more effective than the first. It provided a "leader/wrangler" function in one of the consultants, who brought an "overarching and democratic vision" to the BSCN process. The full-time coordinator brought order to the process and propelled the work forward by distributing agendas and notes, and by reminding Working Group members of commitments that they had made. Other members of the support team deepened the Working Group's ability to function as a cohesive unit, providing technical advice and facilitation, and helping the group reflect on, analyze, and improve its own process.

Of equal importance was what the second backbone organization did not do – it did not become a source of programming independent from the six collaborating institutions. Frequently over the course of the year, Working Group members mentioned that, with the "old" backbone organization, they would find themselves being told that they must contribute resources and time to collaborative projects they had had no part in developing and to which they had not agreed. Understandably, this led to varying levels of mistrust and resentment amongst some of the partners. Freed by the grant from the need to develop funding sources to support a centralized backbone organization, the second backbone scenario could focus on helping the Working Group to steward collaborative ideas through the product development pipeline. In addition, because the second backbone configuration lacked independent fundraising resources, collaborative ideas that required funding had to "borrow" these resources from the six partner institutions, potentially inhibiting their progress but ensuring that those ideas that were developed would have significant support from leadership.

A retrospective analysis of the HOB closure is beyond the scope of this paper. In the context of the BSCN process, the HOB closure removed any ambiguity about ownership of the consortium's programs. There was no more "them" – only "us." The partners could no longer point to a central backbone organization as holding responsibility for the collective agenda. Stripped of its backbone organization, the consortium was no more or less than the sum of its partners and their will to collaborate. Contractors were temporarily engaged to facilitate the BSCN process, but any collaborative programs that would move forward would exclusively reflect the will of the partners. In its recommendations for moving the BSCN process forward (Work Product #25), the Working Group recognized that some level of administrative support would be necessary to keep the community listening and diagnostic work moving forward. While a small backbone organization may rise again, its size and influence should never exceed the will of the partners to collaborate.

CONCLUSION

The conclusion of the BSCN project comes at a pivotal point in the life of the Heart of Brooklyn. The HOB Board remains committed to the partnership and the spirit of collaboration that started 13 years ago remains. However, there are a number of operational issues to address including adopting a version of the BSCN post-grant recommendation on a test basis, determining the role and function of the HOB board without a backbone organization, and determining how collective programs such as the Brooklyn Cultural Adventures Program will continue to operate. It's a work in progress, but I am confident we will continue to build on the successful history of the Heart of Brooklyn and effectively develop ways to meet both our collective needs and those of the many communities in which we serve.

—Denise McClean
Facility Director of Prospect Park Zoo
HOB Board President

HEART OF BROOKLYN
A CULTURAL PARTNERSHIP

BUILDING STRONG COMMUNITY NETWORKS

GUIDE TO BSCN RESOURCES AND WORK PRODUCTS

Following is an annotated list of work products resulting from the BSCN implementation project. These work products may be downloaded from the BSCN website at:

www.heartofbrooklyn.org/BSCN/process

WORK PRODUCTS

Year 1 Diagnostic and Public Value Audit

1. **BSCN Project Brief and Year 1 Scope of Work.** This document was used to initially orient Working Group and Steering Committee members. Prepared by WolfBrown, Jan. 2012.

2. **Stakeholder Interview Briefing Document.** This document explains the first part of the public value audit, and was used to orient the six partners in advance of a series of interviews. Prepared by New Knowledge Organization, March 2012.

3. **Cross-Institutional Program Matrix (Excel file).** This document includes a compiled list of a cross-section of programs and audiences across the six institutions, in a preliminary effort to identify areas of common activity and service to the community. Prepared by New Knowledge Organization, May 2012.

4. **Matrix of Overlapping Stakeholders (Prioritized).** This worksheet was used by the Working Group to set initial priorities for community research. Prepared by WolfBrown, May 2012.

5. **Prioritization Results Memorandum.** This memorandum to the Working Group summarized results of the prioritization process. Prepared by WolfBrown and New Knowledge Organization, June 2012.

6. **Interim Report: The Public Value Audit, BSCN Program and Stakeholders' Analysis.** Prepared by New Knowledge Organization, June 2012.

7. **BSCN PVA Focus on Youth Report.** This report discusses findings from a pair of teen focus groups as well as results pertaining to youth development from a survey of Brooklyn adults. Prepared by New Knowledge Organization, October 2012.

8. BSCN PVA Community Research Full Report. This report summarizes a mixed method study of BSCN stakeholders, including results of a quantitative survey of Brooklyn adults. Prepared by New Knowledge Organization, December 2012.

9. BSCN PVA Community Research Executive Summary. A four-page summary of the community research conducted by New Knowledge Organization, December 2012.

10. Case Studies in Collaborative Programming. This document highlights a series of six case studies on collaborative programming. Prepared by Jonathon Shwart, Karen Tingley and Working Group members, February 2013.

11. Towards a Fuller Understanding of the Decision Processes Leading to Collaboration. This report summarizes insights gained through interviews with staff of the six HOB institutions regarding how they make decisions about collaborative programming. Prepared by John Shibley, January 2013.

12. National Seminar materials. This document includes the conference agenda and summary report. Prepared by HOB staff and Hillary Richard, March 2013.

WORK PRODUCTS

Year 2 Community Process

13. BSCN Year 2 Calendar of Working Group Meetings. A calendar listing the Working Group meetings, highlighting the three cycles of community work.

14. BSCN Year 2 Preliminary Process Ideas (PowerPoint file). This presentation outlines the Year 2 process (subsequently refined). Prepared by WolfBrown, Nov. 2012.

15. BSCN Year 2 Prioritization Steps. This document outlines a working understanding of prioritization steps along the way from ideation to implementation. Prepared by WolfBrown, Feb. 2013.

16. BSCN Pool of Ideas as of Sept. 2013. This document represents the sum total of all collaborative programming ideas emerging from the Year 2 BSCN process. Prepared by WolfBrown, Sept. 2013.

17. Community Listening-Accessibility May 2013. Agenda, protocol and summary of an expert panel discussion on serving children and adults with cognitive disabilities. Video documentation may be viewed at www.youtube.com/watch?v=dbbWW6S5JNo

18. Community Listening-Emergent Bilingualism and Language Barriers July 2013. Agenda, protocol, and summary of a community listening event regarding Emergent Bilingualism, including a PowerPoint presentation by ThinkBrooklyn on demographic patterns. Video documentation is available in three segments:

Segment 1: demographic presentation www.youtube.com/watch?v=ZHsFbLObMF4
Segment 2: expert panel discussion on emergent bilingualism www.youtube.com/watch?v=2RNHOuP5Npg
Segment 3: report outs on small group discussions about emergent bilingualism www.youtube.com/watch?v=9RI0Tja1D8A

19. Teen Idea Committee Charge. A memo from Alan Brown defining the work of the idea committee appointed to further conceptualize teen programs.

20. Teen Committee Proposal September 2013. The proposal produced by the Teen idea committee.

21. Access Idea Committee Charge. A memo from Alan Brown defining the work of the idea committee appointed to further conceptualize access programs.

22. Access Committee Proposal September 2013. The proposal produced by the Access idea committee.

23. Joint Community Outreach Proposal-Multilingual Interns. The proposal generated by a subgroup of Working Group members desiring to collaborate on multilingual interns.

24. BSCN Year 2 Developmental Evaluation Report. Report from independent evaluation John Shibley on his developmental evaluation of the Year 2 BSCN process. Prepared by John Shibley, October 2013.

25. BSCN Post-Grant Recommendations. Drafted by all members of the consulting team and vetted by the Working Group, this document lays out the recommendations of the Working Group for moving forward with the BSCN process. It was presented to the HOB Board of Directors on Sept. 16, 2013.

For more information about the BSCN work products, contact:

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ENDNOTES

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