Welcome

1. **Brief Introduction to The Intersector Project and Cross-sector Collaboration | 2 – 2:20 p.m.**

2. **Sector Styles Learning Groups | 2:20 – 3:10 p.m.**

3. **Break | 3:10 - 3:25 p.m.**

4. **Partnering Scorecard Case Simulation: Transportation and Air Quality Collaboration in Sacramento | 3:25 p.m. – 4:15 p.m.**

5. **Facilitated Discussion | 4:15 – 4:45 p.m.**

6. **Q & A and Closing | 4:45 – 5 p.m.**

Learning Objectives

- **Reflect on the differing languages, cultures, and practices of the government, business, and non-profit sectors and, through facilitated peer learning, deepen your understanding of strategies to navigate those differences**

- **Learn key tactics and best practices for designing and leading cross-sector partnerships and reflect on the challenges to applying them in environments characterized by shared decision making authority**

- **Practice designing partnering agreements that create an effective framework for sustained collaboration with organizations and individuals in the business and non-profit sectors to accomplish shared goals**
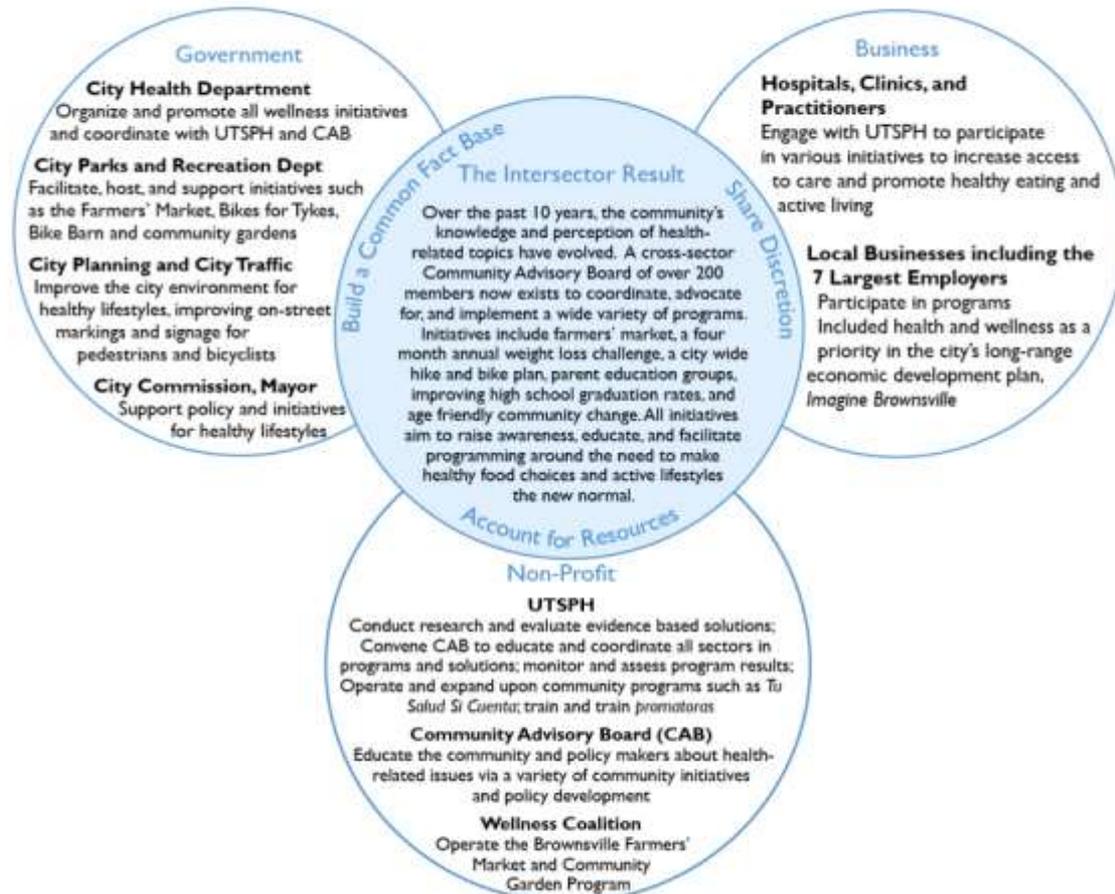
Cross-sector Collaboration

- **The linking or sharing of information, resources, activities, and capabilities between or among two or more sectors to jointly achieve an outcome**

Examples of Cross-sector Collaboration
Creating an Environment for Healthy Lifestyles in Brownsville, TX
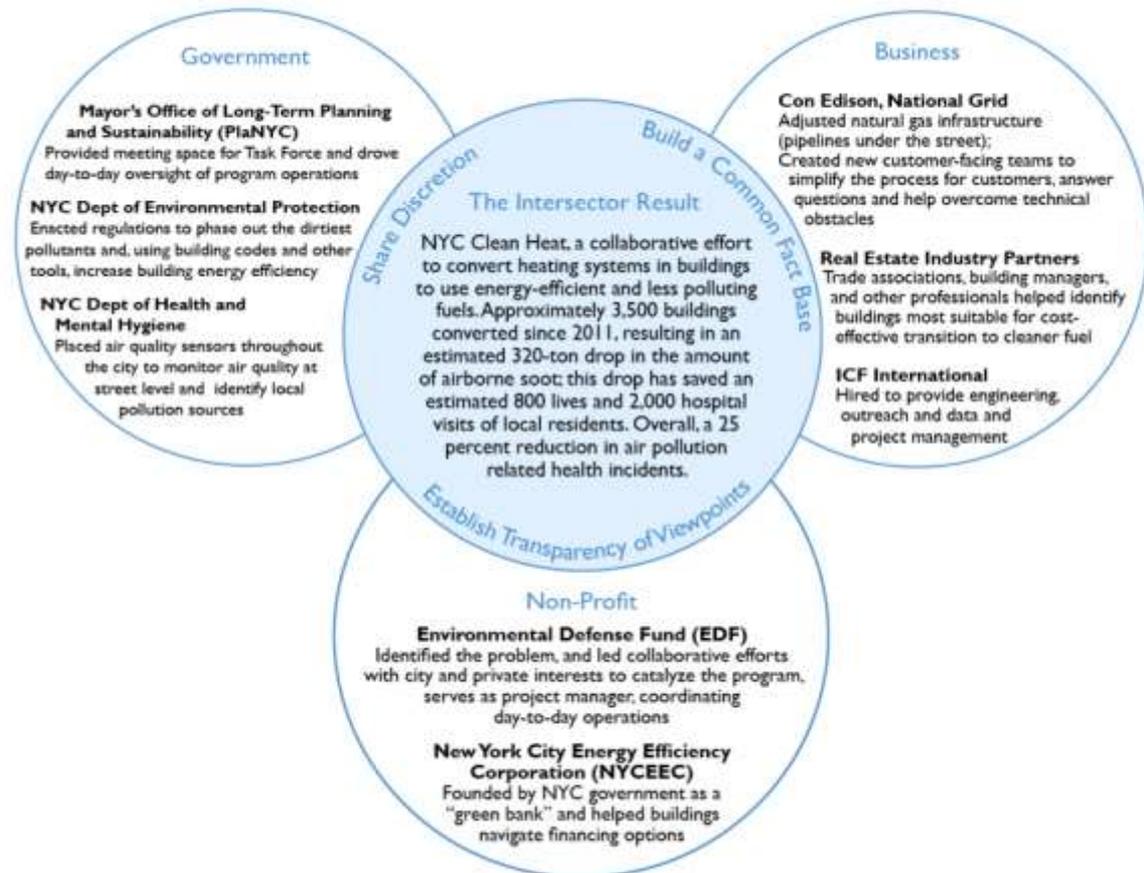
A public university, leaders from the City Council, City department heads and staff, and local business and community leaders formed a Community Advisory Board to address high rates of obesity, diabetes, and lack of insurance coverage in their community. They created a farmers' market and an integrated network of initiatives including an annual weight loss event, an open streets program, sidewalk and safe passing ordinances, and more.

Government

City Health Department
Organize and promote all wellness initiatives and coordinate with UTSPH and CAB

City Parks and Recreation Dept
Facilitate, host, and support initiatives such as the Farmers' Market, Bikes for Tykes, Bike Barn and community gardens

City Planning and City Traffic
Improve the city environment for healthy lifestyles, improving on-street markings and signage for pedestrians and bicyclists

City Commission, Mayor
Support policy and initiatives for healthy lifestyles

Business

Hospitals, Clinics, and Practitioners
Engage with UTSPH to participate in various initiatives to increase access to care and promote healthy eating and active living

Local Businesses including the 7 Largest Employers
Participate in programs Included health and wellness as a priority in the city's long-range economic development plan, *Imagine Brownsville*

Build a Common Fact Base

The Intersector Result

Over the past 10 years, the community's knowledge and perception of health-related topics have evolved. A cross-sector Community Advisory Board of over 200 members now exists to coordinate, advocate for, and implement a wide variety of programs. Initiatives include farmers' market, a four month annual weight loss challenge, a city wide hike and bike plan, parent education groups, improving high school graduation rates, and age friendly community change. All initiatives aim to raise awareness, educate, and facilitate programming around the need to make healthy food choices and active lifestyles the new normal.

Share Discretion

Account for Resources

Non-Profit

UTSPH
Conduct research and evaluate evidence based solutions; Convene CAB to educate and coordinate all sectors in programs and solutions; monitor and assess program results; Operate and expand upon community programs such as *Tu Salud Si Cuenta*; train and train *promotoras*

Community Advisory Board (CAB)
Educate the community and policy makers about health-related issues via a variety of community initiatives and policy development

Wellness Coalition
Operate the Brownsville Farmers' Market and Community Garden Program

Examples of Cross-sector Collaboration
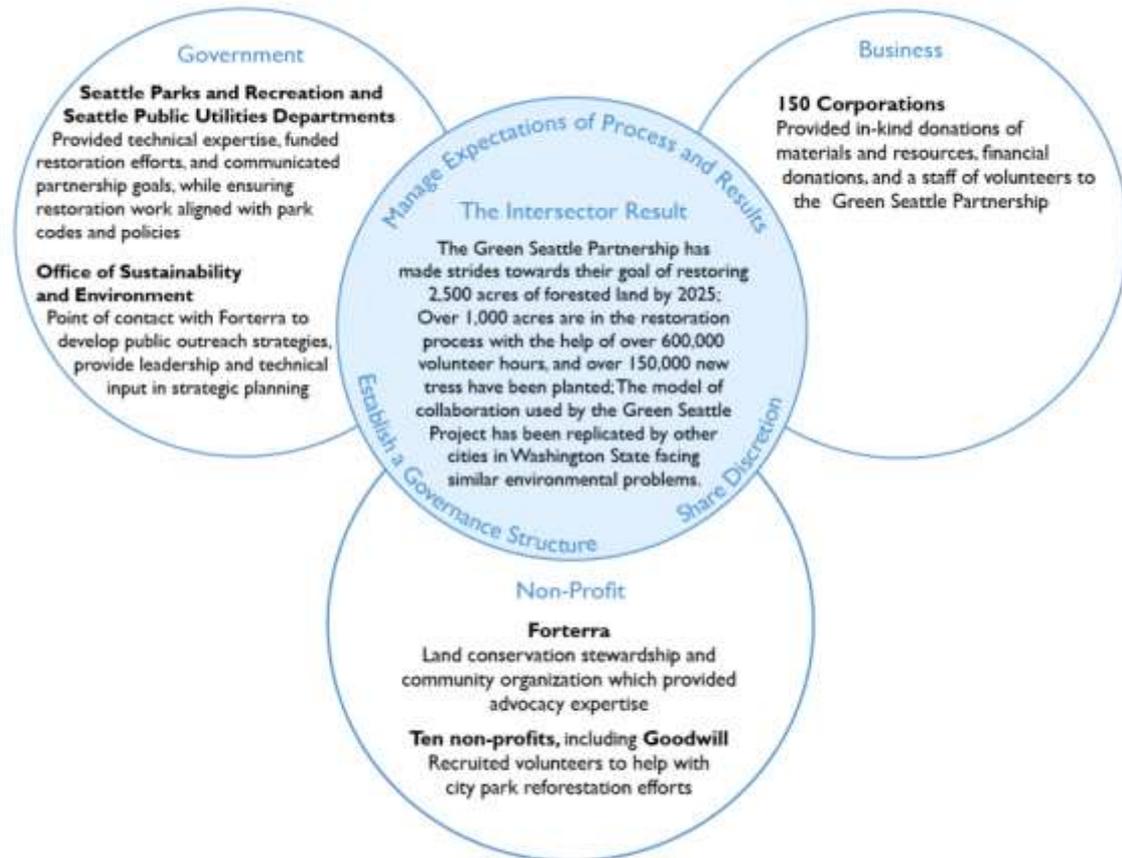# Returning NYC Air Quality to the Highest in 50 Years

The City Department of Environmental Protection, the Mayor's Office, the Environmental Defense Fund, and local businesses partnered to create the NYC Clean Heat program, which united action by government, utilities, banks, real estate leaders, and non-profits to help buildings convert their boilers to a range of cleaner fuel options, leading to one of the fastest and most significant air quality improvements in the city's history.

Government

Mayor's Office of Long-Term Planning and Sustainability (PlaNYC)
Provided meeting space for Task Force and drove day-to-day oversight of program operations

NYC Dept of Environmental Protection
Enacted regulations to phase out the dirtiest pollutants and, using building codes and other tools, increase building energy efficiency

NYC Dept of Health and Mental Hygiene
Placed air quality sensors throughout the city to monitor air quality at street level and identify local pollution sources

The Intersector Result

NYC Clean Heat, a collaborative effort to convert heating systems in buildings to use energy-efficient and less polluting fuels. Approximately 3,500 buildings converted since 2011, resulting in an estimated 320-ton drop in the amount of airborne soot; this drop has saved an estimated 800 lives and 2,000 hospital visits of local residents. Overall, a 25 percent reduction in air pollution related health incidents.

Build a Common Fact Base
Share Discretion
Establish Transparency of Viewpoints

Business

Con Edison, National Grid
Adjusted natural gas infrastructure (pipelines under the street); Created new customer-facing teams to simplify the process for customers, answer questions and help overcome technical obstacles

Real Estate Industry Partners
Trade associations, building managers, and other professionals helped identify buildings most suitable for cost-effective transition to cleaner fuel

ICF International
Hired to provide engineering, outreach and data and project management

Non-Profit

Environmental Defense Fund (EDF)
Identified the problem, and led collaborative efforts with city and private interests to catalyze the program, serves as project manager, coordinating day-to-day operations

New York City Energy Efficiency Corporation (NYCEEC)
Founded by NYC government as a "green bank" and helped buildings navigate financing options

Examples of Cross-sector Collaboration
Reforestation of Parks in Seattle

The City and local environmental leaders formed the Green Seattle Partnership, with the aim of arming citizens to help the city's trees in partnership with the Department of Parks, public utilities departments, and the Office of Sustainability and Environment.

Government

Seattle Parks and Recreation and Seattle Public Utilities Departments
Provided technical expertise, funded restoration efforts, and communicated partnership goals, while ensuring restoration work aligned with park codes and policies

Office of Sustainability and Environment
Point of contact with Forterra to develop public outreach strategies, provide leadership and technical input in strategic planning

Manage Expectations of Process and Results

The Intersector Result

The Green Seattle Partnership has made strides towards their goal of restoring 2,500 acres of forested land by 2025; Over 1,000 acres are in the restoration process with the help of over 600,000 volunteer hours, and over 150,000 new tress have been planted; The model of collaboration used by the Green Seattle Project has been replicated by other cities in Washington State facing similar environmental problems.

Establish a Governance Structure

Share Discretion

Business

150 Corporations
Provided in-kind donations of materials and resources, financial donations, and a staff of volunteers to the Green Seattle Partnership

Non-Profit

Forterra
Land conservation stewardship and community organization which provided advocacy expertise

Ten non-profits, including **Goodwill**
Recruited volunteers to help with city park reforestation efforts

Cross-sector Collaboration

- The practice of partnership is evolving, with a proliferation in different models and methods for engaging the business and non-profit sectors.

- Public-private partnerships, collaborative governance, collective impact, multi-sector partnership, cross-sector collaboration are terms used to describe similar phenomena.

- Cross-sector partnerships can range from consultative to those that incorporate true shared decision making processes.

- It's more important than ever to thoughtfully consider the risks, rewards, costs, and benefits of sharing what is traditionally considered "public work" with the private sector.

The Intersector Project

A non-profit organization that empowers practitioners in the business, government, and non-profit sectors to collaborate to solve problems that cannot be solved by one sector alone

The Intersector Project

Our Approach

- **Commentary, research, and thinking focuses particularly on the United States**

- **Work is both sector- and issue-neutral — created for practitioners from all sectors, working on a range of issues, across the United States**

- **Resources speak to the broad array of collaborative approaches that practitioners in the field are actively using to solve problems**

The Intersector Project

How We Work

- **Creating resources for practitioners, including our Toolkit, Case Library, Resource Library, and ongoing research projects**

- **Bridging the research to practice divide**

- **Communicating our work to practitioners in every sector – engaging with a wide variety of thinkers and practitioners on this topic — from designers of innovative public-private partnership mechanisms at NASA to local government managers pursuing improved service delivery for their constituencies**

The Intersector Project

Our Resources

- **Toolkit for Intersector Collaboration**

The Intersector Toolkit: Tools for Cross sector Collaboration is a starting point guide to assist practitioners in cross-sector collaboration. It simply and clearly articulates the essential ingredients of collaboration, providing practical knowledge for practitioners to diagnose, design, implement, and assess cross-sector collaborations in their communities. The best practices outlined here are relevant to a wide variety of problem types, issues areas, and partnership structures.
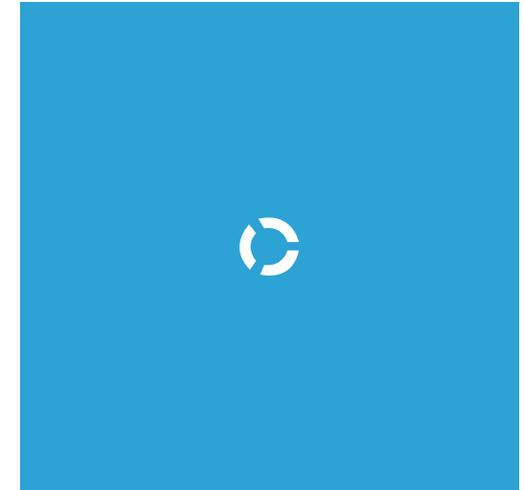
THE INTERSECTOR PROJECT

The Intersector Toolkit:
Tools for Cross-Sector Collaboration

The Intersector Project

Our Resources

- **Case Library**

One of the leading libraries on cross-sector collaborations in the United States, The Intersector Project's case studies are created specifically for practitioners. These brief stories illuminate the key contributions and collaborative tactics of partners across the United States in a variety of issue areas, including community revitalization, health and wellbeing, infrastructure, education, and environmental conservation.

The Intersector Project

Our Resources

- **Resource Library**

The Intersector Project Resource Library is an online, searchable catalog of hundreds of quality resources related to cross-sector collaboration from research organizations, advisory groups, training organizations, academic centers and journals, and other sources. The Library includes resources relevant to all sectors, a wide variety of partnering models (from traditional public-private partnerships to community partnerships), and a broad range of issue areas (from infrastructure to public health).

The Intersector Project

Our Resources

- **Monthly Briefing, Research to Practice, and Researcher Insights**

- Academic research often holds knowledge that can benefit the many practitioners working in cross-sector collaborations. The Intersector Project has a unique commitment to connecting research to practice by maintaining active relationships with both groups and working to produce content that brings them together. We produce a Research Briefing that highlights the latest research relevant to cross-sector collaboration; an in-depth look at one article per month through our Research to Practice series; and our Researcher Insights series, in which we invite scholars to distill their research for our practitioner audience.

Institutional Logics & Sector Styles

- **Each sector — and indeed each entity within the sectors — has a distinct institutional logic – an operational and behavioral pattern that influences the actions and mindsets of organizations and individuals – as well as is its own language, culture, and work practices, which can prove challenging to align when pursuing shared goals in a consensus-oriented environment.**

- **In government, this may includes acting in a way that demonstrates respect for particular bureaucratic structures that represent democratic values. For business, it can include an emphasis on profitability through competitive actions. For the non-profit sector, it often includes a service orientation that addresses unmet needs.**

- **These differences ultimately influence how cross-sector partners approach key collaborative tactics**

Institutional Logics & Sector Styles

Differences between the sectors ultimately influence how cross-sector partners approach key collaborative tactics

Manage Expectations of Process and Results

- **The capacity to communicate progress, celebrate success, encourage patience when needed, and allow for flexibility as the collaboration progresses**

- **Communicating progress toward goals, as well as recognizing when to adapt to changing circumstances, new information, and shifting priorities, allows the collaboration to maintain engagement and momentum.**

Institutional Logics & Sector Styles

Manage Expectations of Process and Results

- **How might individuals from different sectors approach this process differently?**

- **Does anyone have any experience with communicating progress and having to shift focus in a cross-sector collaboration?**

- **If so, were there differences in viewpoint among partners?**

Institutional Logics & Sector Styles

Manage Expectations of Process and Results

- Influenced by sector- and organization-specific practices and norms, partners may have differing expectations for the pace of progress, differing preferences for how progress is communicated, differing appetites for and abilities to be flexible and adapt to changing priorities and circumstances.

- For example, government sector partners, or indeed other partners from organizations led by large bureaucracies, may have limited ability to shift strategy without approval from within their organization, while sector partners who have cultures that are more open to prototyping may be more open to shifting strategy. Certain partners may be comfortable with informal communication of progress, while others are accustomed to detailed reports complete with quantitative data they can circulate up through their management structure. Certain sector partners may come from cultures where slow progress is acceptable while others demand quick progress.

Institutional Logics & Sector Styles

Brainwriting to Explore Sector Styles

- **Please take a moment to review Handout 1: "Brainwriting to Explore Sector Styles."**

- **We will explore:**

    - How would you describe the culture of this sector?

    - What are its motivations and incentives?

    - What are its limitations?

    - What are its assets?

Institutional Logics & Sector Styles

Brainwriting to Explore Sector Styles

- **What themes did you see appear multiple times for the government sector? Business sector? Non-profit sector?**

- **What themes did you see appear for multiple sectors?**

- **What, if anything, is surprising about the sector styles we identified?**

- **Can anyone relate this discussion to one of the experiences that have had working across sectors?**

- **Given that we've identified different styles, how does that influence an organization's ability to collaborate?**

15 Minute Break

Partnering Agreements

- **Create "an effective framework" for cross-sector partnership**

- **"Lay a foundation of sustained co-operation through enhanced mutual understanding"**

- **Provide "mechanisms to cope with relational, performance, and situational risks" that characterize cross-sector relationships**

- **Partnership agreements can be similar to traditional contracts (they aim to "safeguard appropriation concerns, coordinate partner's roles and responsibilities and allow for adaptation in the face of uncertainty") but also include "critical relational elements."**

Pfisterer, S. , Payandeh, N. and Reid, S. (2014). Designing Comprehensive Partnering Agreements: Introduction to the Partnering Agreement Scorecard. The Partnerships Resource Centre: Rotterdam. ©2014, The Partnerships Resource Centre and The Partnering Initiative

The Partnering Agreement Scorecard
From The Partnerships Resource Centre and The Partnering Initiative

Please take a moment to review Handout 2: "The Partnering Agreement Scorecard."

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- **Includes "an overview of the nature and value of agreements and a new tool for their construction and review"**

- **Of value to any organization contemplating initiating a new or reviewing an existing partnership**

- **Provides a "shorthand of the most critical questions that should be addressed when developing a partnership," and offers a "structure for generating and assessing an agreement which should fit the initial needs of most partnerships"**

Pfisterer, S. , Payandeh, N. and Reid, S. (2014). Designing Comprehensive Partnering Agreements: Introduction to the Partnering Agreement Scorecard. The Partnerships Resource Centre: Rotterdam. ©2014, The Partnerships Resource Centre and The Partnering Initiative

Partnering Scorecard Case Simulation: Transportation and Air Quality Collaboration in Sacramento

- **Please take a moment to review Handout 3: "Partnering Scorecard Case Simulation: Transportation and Air Quality Collaboration in Sacramento"**

- **Key Facts**

  - Metropolitan area experiencing rapid growth

  - Rising concerns of maintaining mobility, enhancing air quality, sustaining economic prosperity, and preserving the region as an attractive place to live and work

  - City officials have initiated the Sacramento Transportation & Air Quality Collaborative to address this

Adapted from "Sacramento Transportation and Air Quality Collaborative Case Study," National Policy Consensus Center, 2003.

Partnering Scorecard Case Simulation: Transportation and Air Quality Collaboration in Sacramento

- **Cross-sector Partners**
    - Forty-eight organizations (including 104 participants and alternates) are participating, recruited from five categories that also meet as interest groups:
    - Business Interest Group
    - Environment Interest Group
    - Government Interest Group
    - Local Community Participants
    - Community Interest Group (Disability, Youth, Seniors, Ethnic etc.)

Adapted from "Sacramento Transportation and Air Quality Collaborative Case Study," National Policy Consensus Center, 2003.

Partnering Scorecard Case Simulation: Transportation and Air Quality Collaboration in Sacramento

- **Purpose**
  - Develop a long range and comprehensive strategy for the Sacramento area to improve transportation and air quality within a regional context, including relevant land use and economic development strategies.
  - This is to be accomplished through an interest-based negotiation process consisting of five steps: 1)Assess, 2) Organize, 3) Educate, 4) Negotiate, 5) Implement
  - The assessment step was initiated in 2016. A subgroup recommended to the City that they proceed with the collaborative process.
  - Before proceeding with Educating, Negotiating, and Implementing, the Collaborative's next step is to design and negotiate a detailed agreement between partners to create an effective framework within which the partners can work and also lay a foundation for sustained collaboration.

Adapted from "Sacramento Transportation and Air Quality Collaborative Case Study," National Policy Consensus Center, 2003.

Key Partnering Questions

- **Who?** For example, Who will represent each partner in the negotiation, planning and implementation of the partnership?

- **Why?** For example, What motivates each partner to engage in the partnership?

- **What?** For example, What project phases will be defined and how will they be distinguished?

- **When?** For example, Is the priority of activities established?

- **How?** For example, Which issues will be brought up for collective decision-making?

- **What If?** For example, Have sanctions been determined in case of breach of commitment?

- **Please choose the 3 – 5 question families that you are most interested in addressing.**

Pfisterer, S. , Payandeh, N. and Reid, S. (2014). Designing Comprehensive Partnering Agreements: Introduction to the Partnering Agreement Scorecard. The Partnerships Resource Centre: Rotterdam. ©2014, The Partnerships Resource Centre and The Partnering Initiative

Partnering Scorecard Case Simulation: Transportation and Air Quality Collaboration in Sacramento

- **Please take a moment to review Handout 4: "Individual, Confidential Role Description."**

- **Please begin once everyone at your table has read their descriptions.**

Partnering Scorecard Presentations

- **Please present your responses to one family of questions.**

- **Discussion Questions:**

  - What questions did you choose to address and why?

  - What areas were easiest to agree on?

  - What areas were most difficult to agree on?

  - What do you think that tells us about cross-sector collaboration?

  - In your experience, which areas outlined in the partnering agreement have presented the greatest challenges, and how have you navigated those?

Do you have questions, comments or want to continue the conversation? Please contact us.

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