THE COLLECTIVE IMPACT PROJECT (CIP) AND ITS FIRST STAGES OF PARTNERSHIP AND OPERATIONALIZATION - SUMMARY REPORT

NANCY POLE – CO.SPIRE CONSULTING & PHILAB
JEAN-MARC FONTAN – UQAM, SOCIOLOGY, PHILAB
The Collective Impact Project (CIP) is a collaborative community development initiative that involves eight philanthropic partners and three other strategic partners. Through the pooling of financial and non-financial resources, the CIP aims to intensify and ensure greater coherence to the support given to comprehensive community development and revitalization efforts pursued by neighbourhoods in Montreal.

The CIP was conceived by Centraide of Greater Montreal and the Lucie and André Chagnon Foundation, who together mobilized the project’s subsequent partners. Centraide is now the project manager.

The project is based on the assumption that if both funding support and funders’ strategic action are coordinated, local communities will be able to achieve more meaningful results with regard to poverty reduction. A further assumption is that this action will work to change systemic conditions at the regional level that impede local communities’ capacity for action.
Based on interviews with partners, local representatives and other key informants, the study identified the following findings for the project’s first year of operation.

• By and large, the project has been favourably received by stakeholders. However, the following adjustments would be appreciated:
  ◦ a pace of implementation that is more accommodating to local dynamics;
  ◦ more consistent and transparent communication;
  ◦ mechanisms for feedback and dialogue between stakeholders, particularly between the grantmakers and grantees.

• On the part of the steering committee partners, there is both:
  ◦ a real willingness to engage in the CIP;
  ◦ participation that is based on their own interests and intentions.

• An organizational model that works relatively well to meet efficiency and learning goals.

• A model that is less suited to meeting collective impact and influence goals.

• There appears to be a tension between the objectives of learning on the one hand and those of demonstrating success on the other.

At this stage of development of the CIP, certain intentions need to be clarified:

  ◦ The role that partners wish to play in order to influence systemic conditions;
  ◦ The vision for sustainability and scaling of the CIP’s action model beyond the five years of the project.
VISION DE PÉRENNISATION À INDIQUER

PRESENTATION
The Collective Impact Project (CIP) is a collaborative philanthropic initiative that describes itself as an accelerator of community change in Montreal. As of January 2017, the CIP was composed of eight philanthropic partners, being the project manager Centraide of Greater Montreal (Centraide) and seven (7) grantmaking foundations acting as financial partners. Three non-financial partners are also members of the CIP steering committee.

Through the pooling of financial and non-financial resources, the CIP aims to intensify and ensure greater coherence to the support given to comprehensive community development and revitalization efforts pursued by neighbourhoods in Montreal.

This study was carried out as part of the CIP's overall evaluation, whose main purpose is to promote strategic learning along four dimensions: strategies of support to communities, the partnership itself, the initiative's regional influence, and the philanthropic action model developed through the initiative.
The study situates the initial intentions and reviews the key moments of the design and early implementation phases of the CIP. Among other things, it focuses on the formation and evolution of the partnership and asks the following questions: What identity does the CIP assume, and what does it want to achieve? How do stakeholders in the CIP action system embrace and understand the opportunity that this initiative represents? The study’s findings are intended to support greater awareness among partners and suggest possible adjustments to be made. It also provides a portrait of the initiative’s starting point, which can then serve as a reference for future evaluation activities.

Between September 2016 and March 2017, the authors consulted the relevant literature and conducted 25 interviews with partners, key informants and representatives of communities eligible for receiving funding support. Their work was guided by a monitoring committee composed of Centraide representatives and a designated resource person.
The partners of the Collective Impact Project at the start of 2017

- Centraide of Greater Montreal (project manager)
- Lucie and André Chagnon Foundation
- Pathy Family Foundation
- J.W. McConnell Foundation
- Mirella and Lino Saputo Foundation
- Silver Dollar Foundation
- Foundation of Greater Montréal
- Molson Foundation
- La Ville de Montréal (City of Montreal)
- La Direction régionale de la santé publique de Montréal (Montreal Regional Public Health Department)
- La Coalition montréalaise des tables de quartier (CTMQ) (Montreal Neighbourhood Tables Coalition)
THE ORIGINS OF THE CIP AND ITS INITIAL PROPOSAL
The CIP is inspired by the tradition of philanthropic support for comprehensive community initiatives (CCIs), also referred to as comprehensive community change efforts. In North America, these initiatives are characterized by their comprehensive and integrated approach to local revitalization and their orientation towards community-building aimed at empowerment, social capital development and civic capacity-building. CCIs have several elements in common with the neighbourhood action already established in Montreal, in particular with the city’s integrated local social development practices, referred to as développement social local intégré (DSLI). Within this local dynamic, local cross-sector and multi-stakeholder round tables (neighbourhood round tables) have then become the focal points of the CIP.

**Figure 1: Initial theory of change of the CIP**
The CIP’s conception is the result of a collaboration between Centraide of Greater Montreal and the Lucie and André Chagnon Foundation. Together, the two foundations developed an initial proposal that other partners later embraced. Once these partners were mobilized, the CIP made a total amount of $21 million available to communities, to be allocated over five years. For Centraide, who is both the project’s designer and manager, the CIP represents an expression of place-based strategic philanthropy as well as a way to test out a new donor strategy that highlights its role as an expert and convener.

With the CIP, the partners are seeking to provide both comprehensive and flexible support to neighbourhoods in order to support them in bringing their integrated local development projects to fruition. At the heart of CIP’s initial theory of change is a hypothesis:

the coordination of financial support and the strategic action of the funders will enable local communities to achieve more significant results in poverty reduction. Their action will also bring improvements to systemic conditions at the regional scale that impede local communities’ capacity.
FINDINGS DRAWN FROM THE STUDY
With a view to contributing to the strategic learning processes of the CIP partners, the study’s findings led us to identify the following considerations and options for making adjustments to the project’s action.

1. The CIP’s reception on the ground and ongoing relations with local communities

The CIP’s reception on the ground has generally been favourable, despite some critical reactions. Stakeholders close to local communities confirmed that the type of support offered by the CIP corresponds to a real need. As the project manager, Centraide has demonstrated the ability to adapt, which has been appreciated by stakeholders on the ground. At the same time, constructive criticism from some of these stakeholders points to areas that require attention in the future:

- Some respondents consider that the CIP’s co-architects should have consulted neighbourhood stakeholders (the intended candidates) before launching the operation.
- The initiative’s pace of implementation is a point of tension. For community stakeholders, the pressure to move too quickly into project implementation mode creates the risk of destabilizing local dynamics. Lessons from similar experiences elsewhere suggest that these concerns are well founded and should be taken into account.
- Stakeholders near the ground also expressed their wish to see greater consistency and transparency in communication between the CIP partnership and local communities, in particular to make the parameters and expectations more explicit.

In order to maintain the foundations of trust and buy-in from local communities, and to communicate the willingness of the partners to collaborate with them in order to learn from one another and to work together to achieve collective impact, partners should consider setting up mechanisms for feedback and dialogue with local communities.
2. The partnership, the operating model and the governance of the CIP

On the whole, the steering committee partners expressed a strong interest and a real willingness to engage in the CIP. Most are interested in the opportunity for grantmaking foundations to work together; to be better able to measure the impact of their grants; to produce systemic effects in the area of poverty reduction; and to learn about ways to support integrated local social development that are most likely to produce lasting effects in communities.

On the other hand, as most of the financial partners had no input in the project's design, their buy-in and participation is somewhat transactional. They signed on in the hope of drawing some benefit from it for their own organization. While they are in agreement with the CIP's overall principles and objectives, each is coming at it from their own particular frame of reference. They are in it with their own intentions and interests.

According to the accounts gathered from the CIP's financial and strategic partners, the collaboration operationalized by the CIP needs to enable the pursuit of several different purposes in terms of efficiency, learning, amplifying the scale and impact of local communities' capacity for action, as well as systems change advocacy.

- The current modus operandi is fairly well suited to pursuing the purposes of efficiency and learning. Partners work together to co-invest in a funding envelope managed by Centraide, an organization with the required expertise to manage the project. In fact, Centraide is the linchpin in the project, mediating between partners and neighbourhood round tables, fulfilling coordination and community relations roles, providing analysis and expertise, and managing the project's implementation. As a result, the decision-making powers as well as the risks and responsibilities are concentrated around Centraide.
• On the other hand, the current organizational model is less suited to the purposes of exercising influence and achieving a truly collective impact. These would require partners to coordinate strategies and leveraging capacities. It would also require a more integrated and high-engagement organizational model in which the partners collaborate to establish common objectives and decide together on the actions to be taken.

As and when these other purposes take on more importance over the course of the CIP, the current model will likely need to evolve into another form. It is important to note that such a development would also allow for a different sharing of risks and responsibilities.

Most partners express the desire to play a more active and assertive role in learning and knowledge generation in connection with the CIP. In addition, some have been keen to move quickly to deploy their own organizations’ supports within neighbourhoods, as a complement to CIP funding. The expression of this desire indicates that most partners are already looking to shift the model towards a higher-engagement form.

3. Intentions and strategies to be clarified

A push and pull between learning and demonstrating success

Most of the steering committee partners are quite engaged with the idea of the CIP learning project. Several have attitudes that are consistent with a learning focus, expressing a desire to learn from failure and to have their thinking be challenged. However, other actors who are closer to the work on the ground and the project’s operations feel more pressure to demonstrate successful results. These are also the actors who bear most of the risks and for whom the consequences of failure weigh heaviest.
The challenge for all actors involved in the CIP evaluation is to not let the objective of demonstrating success determine which information gets prioritized when imparting the lessons learned from the experience. In order for everyone to learn from what doesn’t work, information and “intel” from the ground needs to be shared freely. It will be up to the partners who are less exposed to risk in the CIP to demonstrate to the actors on the ground and connected to the project’s operations that they wish to create conditions where failure is not only allowed but also welcomed as an opportunity for learning.

In a spirit of transparency, partners should also think about sharing all parts of the CIP’s learning agenda with everyone in the CIP action system, including grantee communities. This will allow stakeholders on the ground to better understand how the data they are providing will be used to inform the decisions of other stakeholders within the CIP action system.

The issue of systems change—and the processes likely to catalyze it—remains to be clarified.

The CIP proposes not only to mitigate the effects of poverty but also to target systemic changes in order to address its causes. For some of the CIP partners, meeting this goal calls on more funders to follow the CIP’s example and adopt flexible funding practices that better support integrated community change efforts. Other steering committee partners would like the CIP to pay attention to administrative policies and practices that pose barriers to the ability of local communities to implement certain actions to improve their neighbourhood. Stakeholders on the ground also expressed the wish that CIP partners act on this second option.

The intentions of the CIP partners as to their role in influencing systems change remain to be clarified. What is their capacity to champion issues and to work to remove systemic barriers that constrain local communities’ capacity for action? If CIP partners assert their intention to work together to remove certain systemic constraints to the implementation of neighbourhood action plans, the CIP could evolve towards a more explicit partnership between the steering committee and community stakeholders.
THE LONG-TERM VISION NEEDS TO BE DEFINED
Several external observers estimate that the CIP is not only an interesting initiative in and of itself, but that its real value resides in the broader meaning it can be expected to take on beyond the experiment in progress. To this end, the CIP partners should try to agree on a common vision of the broader sustainability changes, in terms of longevity and ripple effects, that they would like to see the CIP engender beyond the five years of the initiative. Depending on the kind of changes that are sought in the CIP’s long-term vision, such a consensus would also have implications for the organizational model to adopt in the short term. For some, the CIP is first and foremost a philanthropic action model (co-investment with joint strategy) that should be scaled out to augment foundations’ support for community change efforts. For others, the CIP is a demonstration project that aims to influence public policy to embrace and better support comprehensive community change approaches. Still others see it as a hybrid of these options. Each of these options should be assessed to determine their potential and limitations.