Collaboration among Funders:
Recommendations from the Literature

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Introduction
Foundations often set ambitious goals involving improvements in population-level health and well-being, but they generally don't have the resources and influence required to bring about those changes. One way that foundations expand their impact is by partnering with other funders. This allows larger sums of money to be devoted to a particular issue, program or organization.

Literally thousands of funder partnerships have been established in the United States since the 1990s. Some of these have been highly successful while others have struggled to agree on a shared agenda or a collective strategy. Moreover, even when funders do find a way to coordinate their funding, the resulting grants don't always add value to the selected nonprofits or to the people they serve.

This report distills what can be learned from the literature on funder collaboratives to understand the challenges that arise, as well as the factors that promote success. A great deal has been written on these issues, beginning with Ralph Hamilton's 2002 report, "Moving Money and Ideas: Issues and Opportunities in Funding Collaboration." For this report, I searched for reports and articles that were available in April 2026 and reviewed those that provided an empirically based analysis of the dynamics surrounding funder collaboratives. I extracted key points from each of the selected reports and then created a synthesis report which covers the following topics:

1. Why do foundations choose to partner with others?
2. What are the different models of funder collaboration?
3. What challenges arise (at least some of the time)?
4. What remedies address those challenges and increase the chances of success?

Sections 3 and 4 focus on forms of collaboration where funders engage actively with one another over time, especially around the question of how they can coordinate their efforts to achieve a shared goal. As will become clear below, there are other forms of collaboration where foundations and individual donors pool their funding but leave it to an intermediary organization to determine strategy, select grantees and manage grants. The challenges and recommendations are different for this second form of collaboration and not covered in this report.

This literature review was commissioned by the Kansas Health Foundation (KHF) to inform its approach to partnering with other funders. KHF has long engaged with small and large foundations with varying scopes (local, regional, statewide, national) in order to expand impact beyond what it can achieve with its own assets. It has become even more motivated to partner with other funders after committing to the goal of advancing how Kansas stands on America's Health Rankings. This report presents recommendations that speak directly to that intent, as well as the more general question of how funders can better work together to achieve large-scale change.

Methodology

The intent of this study was to distill relevant literature to provide empirically based analyses and lessons regarding funder collaboratives. It is important to clarify that the study focuses on collaborative efforts where funders engage with one another. We are not attempting to draw lessons for the sorts of collaboration that have been emphasized in the literature on "collective impact" (Kania & Kramer, 2011), where nonprofits and government agencies come together to develop a shared strategy for addressing a complex, cross-cutting issue, often at the behest of a funder.

A second key feature of this literature review is the focus on articles and reports that reflect **empirical analysis**. This includes any of the following methods: case studies of successful or unsuccessful collaboratives, interviews with individuals who had participated in funder collaboratives, reflections from an author who had direct experience with collaborations, or a review of the empirical literature on collaboration. The review did not include reports that present only an abstract theory of what collaboration *should* look like.

The first step in the study was to identify potentially relevant articles and reports using web-based search engines. Searches were conducted within Google and Google Scholar using search terms such as: "funder collaboratives," "foundation collaboration," and "philanthropic partnerships." The articles and reports identified through these searches were separated into those that relate specifically to funder collaboratives versus those that describe broader forms of collaboration where funders serve as conveners. Only the first set was retained for further analysis.

The initial set of relevant articles and reports (especially those that conducted a literature review) sometimes pointed to additional unpublished reports relevant to the study.[1] These were added to the literature base used in this study.

A total of 28 articles and reports were regarded as providing an empirical analysis of funder collaboratives.[2] This set includes only 3 articles in peer-reviewed journals. Another 7 articles appeared in *Stanford Social Innovation Review* (which is editorially reviewed). The remainder were white papers and guides written by individual foundations, affinity groups [e.g., Grantmakers for Effective Organizations (GEO)], consulting firms (e.g., the Bridgespan Group) and academic institutions. Some reports are case studies of specific collaborative efforts, while others draw from the insights of individuals involved in a wide range of collaboratives. And most importantly, some of the available reports summarize findings from previous reviews of the literature.

For each of the articles and reports selected through the search process, I extracted the following information (to the extent it was presented):

- The type of report (e.g., case study, synthesis of the field, guidebook, "lessons learned");

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[1] A report by Alison Powell, Susan Wolf Ditkoff and Kate Hassey (2018) was especially useful in this regard. They conducted an extensive literature review which examined over 100 articles/reports on the topics of either funder collaboration, pooled funding, funder involvement in collaboration, or collective impact. Their report includes thumbnail descriptions of 22 articles, some of which were highly relevant to the current literature review. The primary limitation of the Powell et al (2018) report is that the review was conducted 8 years ago, so more recent reports and articles needed to be identified through other means.

[2] These are listed in the references with an asterisk.

- The type of research conducted (e.g., interviews, survey, literature review);
- The form of funder collaboration that the report focused on;
- The benefits (or potential benefits) of funder collaboration – to the participating funders, to the organizations that receive grants, and with regard to societal impact;
- The challenges that need to be navigated when funders attempt to collaborate;
- The negative consequences that can arise (both to funders and to grantees); and
- Recommendations for successful and effective collaboration.

This information was synthesized to inform the findings that follow. This report also incorporates some well-accepted lessons included in articles, reports and books that explore the larger topic of collaboration (e.g., Mattessich & Monsey, 1992; Chrislip & Larson, 1994; Himmelman, 1996; Kania & Kramer, 2011; Easterling, 2013; Weaver, 2021). In addition, the author's personal experiences designing, facilitating and evaluating collaborative processes were taken into account when choosing what to emphasize from the literature.

The Value Proposition for Funder Collaboration

Given that collaboration imposes significant costs on the participating funders (e.g., dollars invested in new administrative structures, time and effort required for meetings, frustration involved in making shared decisions), it is important to clarify why this is something that funders might want to do.

The primary rationale for collaborating with other funders is that this can expand the amount of funding available to address an issue that the foundation has prioritized. Along similar lines, when funders come together to share their respective strategies, they sometimes discover adaptations that expand their collective ability to achieve their respective goals. These adaptations can be either **technical** (e.g., foundations align their grantmaking processes in ways that allow funded nonprofits to be more efficient) or **strategic** (e.g., co-developing a larger scale initiative that extends what each foundation had been trying to accomplish).

A number of additional benefits of funder collaboration are cited in the literature:

- Funders can learn from one another which nonprofits are doing particularly innovative work on the issues they care about.
- If the funders are supporting the same nonprofits, they can potentially gain some economies of scale with regard to grants administration (e.g., sharing of information gained through due diligence, analysis of grantee progress reports, creation of dashboards).
- When funders coordinate their efforts, they are able to support larger, more comprehensive projects that go beyond what would be supported by any individual funder.
- Having multiple funders focused on the same issue creates opportunities for raising the public and political profile of the issue they are addressing and the solutions they are supporting. Funders working together can attract more attention from media and elected officials than they have working alone.
- Especially when the participating funders are focusing on the same issues, collaboration allows them to learn from one another and to partner with national experts who can provide new insights about how to address the issue.
- Collaboration lays the groundwork for the creation of peer networks that can last even after the collaborative process ends. These networks assist foundation staff in their learning, grantmaking and strategizing over the long run.

Options for Collaboration

One of the most consistent and important recommendations from the literature is that foundations should have a clear sense of why they want to collaborate with other funders and then choose a model of collaboration that fits that purpose. The following list shows five distinct scenarios that might prompt a foundation to seek out other funders for collaboration:

1. Funders working in the same area recognize that they can improve their approaches if they come together to learn from one another.
2. A funder is interested in having an impact in a particular area but hasn't identified a strategy or a set of nonprofits that are able to achieve those impacts.
3. The funder knows which groups are key to achieving its goals but has limited grantmaking ability. It needs to combine with other funders in order to generate grants that are big enough to allow an impact.
4. Multiple funders find that they are funding the same set of nonprofits and are concerned that they might be acting at cross-purposes with their separate approaches to grantmaking.
5. Multiple funders find that they have similar goals and decide they can get to a more comprehensive solution if they come together in a collective planning effort.

These scenarios lend themselves to different forms of collaboration, ranging from informal get-togethers where funders compare their experiences to formal processes where funders seek to create a shared strategy. Drawing on the "Collaboration Spectrum" that Tamarack Institute developed in the early 2000s (Weaver, 2021), these different forms of partnering can be distinguished according to the following continuum:

- Communication: Inter-organizational information sharing
- Cooperation: Informal interaction (as needed) on discrete activities or projects
- Coordination: Organizations systematically adjust and align work with each other to achieve greater outcomes
- Collaboration: Longer-term interaction based on a shared mission, goals, shared decision making, and resources
- Integration (or Merger[3]): Fully integrated programs, planning, and funding

The Continuum Spectrum can be a useful guide when two or more funders are exploring how they might want to work together. Before proceeding with a partnership, they should agree on what they expect that partnership to involve (at least initially).

The Collaboration Spectrum provides a generic sense of what partnering can look like for any set of organizations. Many other researchers have developed models or taxonomies that are specific to funders: Hamilton (2002), Buhl (2004), Gibson & MacKinnon (2009), Ditkoff (2012), GEO (2014), Huang & Seldon (2014), Powell, Ditkoff & Hassey (2018), Powell, Ditkoff & Twersky (2019). I have synthesized their work to create the following list of alternatives for funder collaboration:

1. **Funder Alliances:** A group of funders who are carrying out "similar" strategies come together to share information and to build more critical mass for their shared work. They might do this by comparing their approaches, by conducting shared research, by co-developing communication strategies that raise the public and political profile of the issue they care

[3] Mergers are uncommon among funders, but this option is useful to include in that it demonstrates the full range of ways that organizations might partner with one another.

about, or by conducting a policy analysis that points to a particular policy that they will each advocate for.

Funder alliances vary in whether or not the participating funders expect that they will be making binding decisions:

a. **Learning networks:** Funders come together to hear what's happening in a particular field or issue area, share information and explore potential strategies for making more effective investments. Each funder takes away whatever lessons they find relevant, without trying to coordinate grantmaking across different funders.
b. **Targeted co-funding:** Participating funders share information about their respective grants and grantees. They are also open to coordinating their grantmaking when they find that they are supporting the same organizations – or should be supporting the same organizations. Although funding might be coordinated, each funder makes and manages grants independently.

2. **Strategic Alignment Networks:** Funders who have a shared strategic interest (e.g., addressing climate change) come together early in the process of developing their strategies. They spend considerable time analyzing the issue, exploring opportunities, discussing various strategies, etc. – before eventually developing a shared strategic approach which has implications for each of the participating funders. These shared strategies might seek to either: (a) achieve an outcome valued by all the funders, (b) build a field or sector, or (c) align the various forms of funding and technical assistance provided to a "core" set of nonprofits that the funders have prioritized.

   Once the shared strategy or agenda has been formulated, the participating funders each carry out their respective approach. This might involve either all funders supporting the same grantees or alternative each funder could support a complementary subset of grantees. In either case, the network has a unified theory of change and a shared rubric for measuring progress.

   Strategic Alignment Networks can operate with either formal or informal rules for participation.
   a. **Formal:** participating foundations need to commit resources to implementing the shared strategy that the group co-develops.
   b. **Informal:** foundations can be involved in the planning and learning phase of the process even if they don't commit dollars to implementation.

3. **Joint Ventures:** Funders with a shared interest establish a new entity to carry out a strategy that they have co-designed and co-funded. Those investing foundations serve on the new entity's board of directors.

4. **Pooled Funds:** Rather than having funders directly participate in the process of co-developing a collective strategy, this model relies on an independent entity (sometimes called a "philanthropy serving organization" or PSO) that attracts funds from a host of funders and takes primary responsibility for strategy development and grantmaking. The PSO has its own staff and its own identity.

Participating funders contribute significant dollars into the pooled fund, but do not actually decide which organizations will be funded. Instead, the new entity manages the grantmaking process and typically acts as a thought leader in the field.

There are two forms of pooled funds which are geared toward different types of funders:

a. **Lean funders:** Individual philanthropists and foundations with small staff often don't have the internal capacity to determine how their dollars can best advance their strategic interests. Joining a funding pool managed by experts in the field allows these funders to direct their dollars to high-leverage opportunities. Example: Blue Meridian Partners.

b. **Foundations with a large staff that have their own strategies:** Even large national and international funders sometimes lack the bandwidth and influence to impact the huge problems they aspire to improve. In addition to joining with other funders in strategic alignment networks, these funders sometimes determine that a new entity is needed to coordinate the joint work, to take the lead in developing large-scale strategies and to advocate for policy change (sometimes in multiple countries). One example of this is ClimateWorks which came out of an initiative jointly launched by Hewlett, Packard, Doris Duke, Energy Foundation, Joyce Foundation and Oak Foundation. While ClimateWorks carries the responsibility for advancing much of these foundations' strategic interests in climate change, the foundations continue to do their own independent grantmaking. One advantage of "pooled funding" organizations like ClimateWorks is that they can offer deep, insider knowledge to the participating foundations as they pursue their own independent strategies.

5. **Collaboratives Led by a "Primary Funder":** In some cases, a foundation will already have established itself as a leader in addressing a particular issue or serving a particular community. Rather than launching a network with members of equal standing, this lead foundation draws other funders into its grantmaking and strategic work. This provides value to the lead funder by expanding the dollars available for grantmaking, while also providing a means for less experienced funders to join into an established strategy with grantees that have a track record of success. The lead funder takes responsibility for measuring progress, convening the partners, sharing lessons, identifying new opportunities, etc.

This taxonomy is designed to help funders decide what form of collaboration they want to pursue with their peers. In addition to reviewing the list, the funder should become clear as to why it wants to collaborate, how much time and money it is willing to contribute to the collaborative effort, and how much control it wants to retain over its grantmaking. This will ensure that the funder does not find itself in a time-consuming process mismatched to its interests and its theory of philanthropy.

It is important to also recognize that some collaborative efforts combine elements from different models. Hamilton (2002) refers to these as "hybrids." Millesen (2015) presents a case study of the Appalachian Ohio Funders Group which illustrates how a network can operate in different ways at different points in time. One of the specific ways that collaborative groups shift their orientation is in moving from the Learning Network model to a Strategic Alignment model. As the participating foundations strengthen their relationships and identify shared interests, they may come to recognize (and take advantage of) opportunities to align for collective impact (Easterling, 2013).

Challenges that Arise in Collaboration

Before entering into a collaborative partnership with other funders, it is important that a foundation have a clear sense of not only what it is hoping to accomplish but also the challenges that might occur. This section summarizes what the 28 reports present as the challenges and complications that arise in funder collaboratives. The following reports were particularly relevant to this exercise: Hamilton (2002), Buhl (2004), Gibson & MacKinnon (2009), Parker (2010), Ditkoff (2012), Seldon (2015), Glass & Pole (2017),Powell, Ditkoff & Hassey (2018), Powell, Ditkoff & Twersky (2019), and Galen (2025).

In presenting the following list of challenges, it is important to note that these come up primarily when a group of funders are actively working with one another to coordinate their respective strategies or to develop a shared approach (either a Strategic Alignment Network or a Funder Alliance where grantmaking is coordinated).

1. There is often a lack of clarity as to what the group is trying to accomplish. This will make it difficult to agree on meeting agendas, decisions, products, etc. Some members of the network may expect to create a shared strategy, while others won't.

2. Collaboration is time intensive on the part of foundation staff who participate in the network. Moreover, there are opportunity costs to participating in a collaborative process. Participating takes time away from engaging with grantees, learning about communities, thinking through options and opportunities, etc.

3. Most collaborative efforts have some degree of interpersonal tension. This can result either from "difficult" personalities or from differences in orientation, background or personality, differences among the participants. In either case, the result can be frustrating conversations and an inability to actually achieve the goals of the collaborative.

4. Because the people participating within a funder collaborative all work for foundations, they may be accustomed to leading meetings and being deferred to. If many of the participants have this orientation, it will be difficult for the group to allow an open space that allows shared interests to emerge.

5. When the participating funders have different levels of assets or power, the larger ones may attempt to assert control. This is especially likely when the partnership involves national and local funders.

6. Some collaborative processes have too much structure. The rules for decision making are so restrictive that the group is unable to actually set priorities or strategy. The constraints may also be burdensome to participants, discouraging their engagement.

7. In contrast, other collaborative processes have too little structure and definition around decision making. These groups can be mired into esoteric or technical conversation, never getting to action.

8. While most collaborative efforts have at least a designated chairperson, they may not have a leader with the required skills. Productive collaboration requires effective leadership,

especially facilitative leadership which can ensure that a group has inclusive, purposeful deliberations (Conley & Goldman, 1994), as well as system leadership which involves seeing the larger system that the group is trying to impact, fostering reflection and generative conversations, and shifting the focus from reactive problem-solving to co-creating the future (Senge, Hamilton and Kania, 2015).

9. Especially if there is not an effective leader, the group may fall prey to "groupthink" (Janis, 2008) where assumptions are not fully examined or challenged. This undermines the critical thinking required to develop strategies that are actually capable of achieving the group's goals.

10. When funders in the network have diverse interests, they will find it difficult to agree on a shared agenda or collective strategy.

11. Funders sometimes enter into collaboratives with constraints as to what they will fund (e.g., anything that might be viewed as encouraging abortion or same-sex marriage). This can limit the range of options available to the entire group.

12. The staff member representing the foundation may not have the authority to commit to any collective strategies the group is trying to develop. Instead, they need to go back to the CEO or some other leader in the foundation (and possibly to the board) in order to officially sign on to the strategy. This can seriously delay decision making and implementation.

13. Most funder collaboratives efforts are long-term endeavors, but the participating foundations may have turnover in the staff that represent them. This makes it difficult to maintain relationships and retain a full understanding of the rationale for past decisions.

14. Nearly all funders change their priorities over time. As they change, the funder may no longer align with the focus of the collaborative.

15. Some collaborative groups fail to adapt in light of changing conditions or in response to what has been learned about their collective strategies. These collaboratives then become ineffective and often lose momentum, sometimes just fading away without a clear ending point or sense of what has been accomplished.

As mentioned above, these 15 challenges pertain primarily to Strategic Alignment Networks and Funder Alliances with coordinated grantmaking. As a general rule, a foundation can expect fewer challenges if they simply want to communicate with another funder about specific grantees. Likewise, funder alliances that focus simply on learning and sharing information won't experience the challenges associated with shared decision making and collective strategies.

It is also important to recognize that a completely different set of challenges can arise when a funder joins forces with a "primary funder" or decides to contribute to a Pooled Fund managed by a PSO. Much less has been written about the challenges associated with those two forms of funder collaboration.

Negative Effects that Can Occur with Collaboration

Even if a funder collaborative succeeds, the impacts might not be uniformly positive. Negative effects can occur at multiple levels: for nonprofits that were previously supported by a foundation in the network, for the foundation itself, or for the larger sector. A number of risks along these lines were identified by Hamilton (2002), Gibson and MacKinnon (2009), and Powell, Ditkoff and Twersky (2019). I have synthesized their concerns as follows:

1. When funders determine that they will fund a particular cohort of nonprofits, this will disadvantage those nonprofits that were not selected. Some of the organizations that would otherwise receive support from at least one foundation will be left out.

2. Likewise, aligning multiple foundations around a single strategic approach or a narrow set of "anointed" grantees can skew the field in ways that limit the range of approaches that foundations deploy or support.

3. Funder networks can be insular and create an ethic of "clubbiness," which diminishes the standing of nonparticipating foundations and nonfunded nonprofits operating in the same space.

4. Foundations lose some of their ability to engage directly with the nonprofits if they commit to a shared grantmaking approach.

5. In spending more time with peer foundations and less time engaging with nonprofits and the communities they serve, a funder collaborative can amplify a foundation's penchant to set its agenda without public accountability.

6. The strategies that come out of Strategic Alignment Networks are, by definition, jointly created and jointly implemented. This makes it challenging for a participating foundation to claim sole credit or to attract all the resultant attention. This might be a limitation for some foundations.

Recommendations

The reports reviewed for this study not only point out the challenges and risks associated with funder collaboratives but also offer recommendations for overcoming those challenges and risks. The Appendix lists the recommendations that were offered in each of 24 different reports (covering 21 distinct studies).

I have synthesized the recommendations listed in the Appendix into a dozen that I consider the most compelling and valuable. This list also incorporates what I have learned through my own experience either participating in, facilitating or evaluating collaborative processes that involve foundations.

1. As the collaborative is being established, the funders that are considering becoming engaged should have open and direct conversations about its purpose. This includes naming what the members will be able to accomplish with the collaborative. If multiple purposes are named, the group should prioritize and identify which one is central. Powell, Ditkoff and Twersky (2019) refer to this as the "primary investment thesis." This thesis will guide what the group does together. Any funders that don't feel strongly about this thesis should consider dropping out.

2. Because funder collaboratives are time-intensive, their primary investment thesis should correspond to a big opportunity that none of the participating funders could do on their own.

3. Once the primary investment thesis is named and agreed upon, individuals with expertise and experience in collaboration should provide an estimate of what it will take – in the way of time and resources -- to achieve the purpose. Participating funders need to understand and commit to those expectations at the front end.

4. Early in the process, there should be dedicated time for members of the group to get to know each other on a personal level and to build trusting relationships – rather than simply moving directly to task-oriented work. On the other hand, it should also be recognized that relationships strengthen through well-designed learning and decision processes.

5. Effective collaboration requires strong facilitative leadership and adequate staff support for the tasks that need to be handled either at or between meetings of the group. Generally, foundation members should not be expected to carry out this work because it conflicts with their roles as participants. Instead, the group should contract with an individual or firm skilled in managing collaborative processes. For especially complex Strategic Alignment Networks, it may be appropriate to use the "backbone organization" model that is integrated into "collective impact" (Kania & Kramer, 2011).

6. If the network or collaborative plans to co-develop a strategy or to coordinate grantmaking decisions, each foundation needs to have a representative involved in the process who has the authority to enter into those commitments – or alternatively, needs to have direct, ongoing access to someone in the foundation who can quickly provide approval.

7. If the group plans to set a common agenda or to create a collective strategy, the rules for making decisions should be spelled out and agreed upon early in the process.

8. In developing a shared strategy, funders should maintain their focus on the big opportunities open to the collaborative. They should avoid falling into the trap of looking for strategies that everyone feels comfortable with, but that don't have much chance of payoff – what Seldon, Tierney and Fernando (2013) refer to as "the meaningless middle."

9. Big opportunities often involve at least some risk, especially a risk of failure. Before agreeing to participate in such a collaborative, all funders should formally acknowledge and accept that risk. This will help prevent moving to the meaningless middle.

10. If developing a collective strategy, "get real on what it will take to make change happen" (Ditkoff, 2012). This means undergoing an in-depth process of inquiry that is both data-driven and based in experience. Bring a range of voices into the process of learning and strategy development. More specifically, hear from individuals and organizations that are closest to the issue being addressed and/or will be responsible for implementing the strategy as grantees or intermediaries.

11. Spend time on the front end aligning around the goals to be achieved, what success will look like, and how that might be measured. Measure progress over time and adjust. Report back the

findings to the group in a timely manner. Reflect on the findings. Learn and make adjustments. Remain flexible and adaptable. Don't be afraid of revising the strategy in order to achieve success and remain relevant.

12. In order to avoid drifting toward irrelevance, the group should periodically take a hard look at whether the collaborative continues to add value, and if not, should take the prerogative to close out the structure. This could occur because either: (a) the collaborative has succeeded in serving its purpose so the funders can move on to something else, or (b) the collaborative has ceased being relevant to the participating funders because their interests have evolved. When the collaborative is first established, the participating funders should acknowledge these eventualities and spell out their exit strategy for one another.

A Major Open Question

The recommendations listed above generally reflect a "consensus" among researchers and consultants who have deep knowledge of funder collaboratives. However, there is one major issue where the literature presents two alternative points of view. This is the question, **should the participants have equivalent roles and equal levels of power?**

On the one hand, leveling the playing field allows all voices to be heard and incorporated into decisions, which is good not only when developing a shared agenda, but also enhances participants' satisfaction with the process (Millesen, 2015).

On the other hand, inequality is actually built into some models of funder collaboration. The Informal Strategic Alignment Network model (Hamilton, 2002) allows some of the participants to refrain from contributing dollars to a collective strategy. In this case, the funders that are willing to commit should legitimately have more influence in the design of the strategy.

This question of equal vs differential levels of influence can be especially thorny in collaboratives where there are funders with very different levels of assets, especially if some are national funders and some are local funders. In practice, these collaboratives often privilege the national funders to a greater degree, often because they have convened the collaborative and paid for the staffing support. But if large, national funders overexert their power, they can trigger resentment among the other partners while also crowding out some of the most promising ideas for strategy (GEO, 2013).

Conclusion

The topic of funder collaboration has been the focus of considerable research and commentary over the past two decades. These reports spell out the challenges associated with collaboration, while also offering wide-ranging guidance so that foundations can achieve their expectations. And perhaps most importantly, these reports map out the range of different models that apply to funder partnerships – ranging from loose networks focused on information-sharing and learning to highly structured collaborative processes designed to generate collective strategies.

One of the strongest recommendations that emerged in this literature review is for foundations to be clear on why they are potentially interested in partnering with other funders before they actually enter into a collaborative effort. There are four key reasons why this is so important. First, knowing what you hope to accomplish will point you toward the right form of collaboration – either a Funder Alliance, a Strategic Alignment Network, a Funding Pool or a "Lead Partner" collaboration. Second, determining the foundation's purpose for collaborating will also clarify how much participation and investment will be expected of the foundation. Third, when the funders in a network are clear on what they hope to accomplish with their participation, they can more quickly develop a shared purpose and get on with the actual work. Finally, any funders not aligned with the group's purpose will be able to quickly ascertain that this would not be a beneficial use of their time.

Bottom line, this discussion demonstrates how much heterogeneity exists within the philanthropic field. Some funders are high-wealth donors who conduct grantmaking with little to no staff support. They can benefit from Funding Pools and "Lead Partner" collaboratives that provide access to high-performing nonprofits they would not otherwise know about. Other funders have well-developed grantmaking functions and a history of funding nonprofits in defined areas of interest. This group can benefit from Funder Alliances that emphasize coordination as a means of avoiding duplication and gaining efficiencies. And then there is a third group of funders that focus on creating specific impacts rather than making grants in particular areas. For this group, Strategic Alignment Networks may be the most valuable form of collaboration because it allows the funders to achieve large-scale impact by co-developing comprehensive strategies that take advantage of philanthropic assets well beyond grant dollars (e.g., convening power, political influence, community leadership, strategic communications).

While Strategic Alignment Networks arguably have the greatest potential to develop breakthrough solutions to large-scale problems, they also have the thorniest challenges and complications. The recommendations presented in this report can help foundations involved in these networks develop effective shared strategies and achieve their desired impacts. But it is important to recognize that these are long-term efforts where participants will need to bring their best intentions and their best thinking. Moreover, collaborative work inevitably competes for attention with all the other responsibilities that participants face back in their own foundation.

For Strategic Alignment Networks to actually succeed, they need skilled facilitative leaders who can motivate full participation, draw out innovative ideas and bring those ideas together into synergistic solutions. Without that sort of leadership and commitment, funder collaboratives often devolve into a string of meetings that distract foundation staff from the impact-oriented work that they could implement within their own organization.

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NOTE: An asterisk (*) indicates that the report or article provides data and/or analysis specific to funder collaboratives.

APPENDIX: Reports that Provide Empirically Supported Recommendations for Funder Collaboration

Report	*Type of Report*	Recommendations / Success Factors
Hamilton, R. (2002) Moving Ideas and Money: Issues and Opportunities in Funder Funding Collaboration, Chapin Hall.	***White paper***. *Synthesis of collaboration approaches based on Interviews with 31 diverse informants who have been directly involved in funder collaboratives*	• Clear values, goals and methods • Relationships, trust and accountability • Equal voice • Candor about self-interest and authority • Communication
Buhl, Alice C. (2004). Local Donor Collaboration. Association of Baltimore Area Grantmakers.	***White paper***. *Case study descriptions and lessons learned from a study of 4 collaborative efforts in Baltimore, based on interviews with participants.*	• Align on mission, results, resource expectations and working styles • Allow flexibility for different types of funder (e.g., different sizes) • Take into account community context • Consider the burden on grantees • Learn and adapt to changing circumstances
Gibson, C & Mackinnon, A (2009). *Funder Collaboratives: Why and How Funders Work Together*, GrantCraft,	***Guidebook*** *based on interviews and other contributions from over 40 foundations, affinity groups and universities.*	• At the outset, stipulate each participant's goals for collaborating • Determine the group's shared purpose early • Demonstrate trust and respect for one another • Establish ground rules for handling business & resolving problems • Use intermediaries or staff
Parker, S. (2010). Lessons from a Ten-Year Funding Collaborative. MacArthur Foundation.	***White paper***. *Case study of Partnership for Higher Education in Africa. This was a Strategic Alignment Network conceived by presidents of Carnegie, Rockefeller, Ford & MacArthur.* *Later joined by Hewlett, Mellon & Kresge.*	• Focus on big opportunities (beyond what any single foundation can do on its own) • Set clear goals • Establish a clear structure and specific rules for decision making • Set time aside for relationship-building • Make the planning period brief • Find common project soon • Require pooled funding for joint projects • Gain support from senior leaders • Participants need to have authority to enter into group decisions • Have a Secretariat to carry out the administrative work and coordination • Understand the time that will be required • Set up an evaluation system • Use single reporting templates for grantees • Seek partners beyond foundations • Establish an exit plan

Report	*Type of Report*	Recommendations / Success Factors
Ditkoff, SW (2012). The Long Spoon Problem. Bridgespan Group.	***White paper*** *based on Bridgespan's consulting with funder collaboratives. Presents a taxonomy of different ways that funders can collaborate, as well as some analysis and recommendations*	• Get clear on what you care about and what success will look like • Get real on what it will take to make change happen (on the ground) • Get better over time

GEO and REDF (2012). *Strategic Co-Funding: An Approach for Expanded Impact.* Grantmakers for Effective Organizations
 	
<u>Lessons repeated in:</u>
GEO (2014). The Smarter Grantmaking Playbook: Strategic Co-Funding. GEO
	Guidebook *based on an analysis of multiple coalitions.*	• **Agree on the destination.** A clearly articulated goal is vital to attracting co-funding partners. This will attract like-minded grantmakers and grantees, while also inspiring and focusing action, and then paving the way for agreement on interim milestones.
		• **Pack for the whole trip.** No matter how valuable, collaboration can fail if there is not a strong organization or group of organizations behind it. This requires significant investments of resources and time.
		• **Watch for road signs.**
		  o Ensure that the outcomes we hope to see from strategic co-funding are appropriate for the time frame of our commitment.
		  o Establish intermediate outcomes and measures that will allow us to gauge whether the initiative is on the right track.
		  o Minimize the evaluation and reporting burden on our grantees and fellow grantmakers as well.

Seldon, W., Tierney, T.J. & Fernando, G. (2013). High-Stakes Donor Collaborations. *Stanford Social Innovation Review.*	***Journal article (SSIR)****. Analysis of 3 high-stakes collaborations – collaborations with a shared multi-year vision around which donors pool talent, resources and decision-making* • *Energy Foundation* • *California Forward* • *Living Cities*	• Ensure that foundation leaders are bought into the collaborative. • Establish productive among participants. • Principals need to be at the table (to enable decision making). • Clear structures and decision processes – choose a specific model (even if not "best"). • Flexibility to enable more ambitious goals • Don't play it safe – avoid "moving to the meaningless center." • Planned exit strategy / Establish timelines for revisiting participation -- to increase accountability and minimize disruption.
Huang, J. & Seldon, W. (2014). Lessons in Funder Collaboration: Packard Fndn, Bridgespan Group. <u>Findings summarized in</u> Seldon, W. (2015) Five Guidelines for successful funder collaborations, *Stanford Social Innovation Review*.	***White paper*** *followed by* ***a journal article (SSIR)****. Analysis of 45 funding collaboratives that the Packard Foundation participated in.*	• Pick the right collaborative structure to align with your foundation's goals. • Weigh the costs and benefits of collaborating before committing. • Members of the collaborative need to align on a vision and goals. • Be clear about the roles the various funding partners will play and the level of investment (time and dollars) that will be required. • Design effective collaboration – governance, decision making. • Use a taxonomy to apply rigor when deciding on the structure. • Create adaptable and flexible strategies. Preserve decision flexibility • Engage the board in key collaboration discussions. • Enact evaluation mechanisms and feedback loops. Adapt based on lessons learned. • Set the exit strategy up front and establish milestones along the way.

Report	*Type of Report*	Recommendations / Success Factors
Millesen J. (2015). Understanding collective impact in a rural funding collaborative: Collective grantmaking in Appalachian Ohio. *The Foundation Review.*	***Journal article (peer-reviewed)****. Case study of Appalachian Ohio Funders Group – 9-member regional grantmaking collaborative committed to strategically enhancing the region's assets through leadership, networking, investments, leveraged resources and collaboration.*	From Literature Review • Dedicated staff time • Open communication • Clearly articulated roles • Shared sense of purpose / Consensus about what constitutes success • Recognize that everyone has something to give and to gain • Level the playing field / equalize power differentials • Learn and share best practices From Case Study • Intentionality and adaptation • Understand each funder's "relationships with the money it grants" and then accommodate those constraints (accountability to local donors, local vs regional focus) • Build and nurture strong relationships among partners (with in-person meetings) • Bring in an independent facilitator • Members need to have an identity that is consistent with the collaborative • Intentional and explicit recognition of costs (material, time, frustration, lost opportunities) and then decide that collaboration is worth it • Flexible participation norms (recognizing different interests and accountabilities) • Leverage organizational diversity • Replication of a model (e.g., collective impact) in its purest form is not always best
Kabel (2016). Five Lessons on Successful Philanthropic Collaboration.	***Conference presentation****. Personal reflections from Kresge's deputy director of Health program.*	• Keep shared purpose top of mind (to reduce fixation on smaller issues) • Taking greater risks will yield greater rewards • Proactively leverage voice and resources to strengthen reputation and funding • Align on governance practices up front • Use scenarios to determine factors that will be deal breakers and factors where funders are willing to compromise.

Report	*Type of Report*	Recommendations / Success Factors
Porter et al (2017). Funder Collaborations – Flourish or Flounder. *Foundation Review.*	***Journal article (peer-reviewed).*** *Analysis of 4 collaboratives involving education funders – each of which included the Hewlett Foundation.*	<u>Summary of lessons from others</u> • Have a clear mission and stick to it • Strong working relationships (honest) • Recognize that there are different forms of collaboration for different functions • Strong backbone management • Flexibility and humility <u>Questions to address in 3 life cycles</u> *Getting Started* • How will we know we are making progress? • How are we creating shared ownership and commitment? *Moving to Action/Implementation* • What decisions will we make? Which will we delegate? • What support and insights do we need from others? *Staying on the Right Track/Maturing* • Why aren't funders showing up? • How do we know it's time to change or wrap up?
Peterson, G. (2017). Philanthropy's Deliberate Leaders: The Story of the ClimateWorks Foundation. *Alliance Magazine.*	***Magazine article.*** *Summary of a case study of ClimateWorks, a large-scale funder collaborative launched by the Hewlett and Packard Foundations. Based on 65 interviews.*	• Build an organization that has capacity on par with the scope of the issue it is seeking to address. Organizational strategy is at least as important as programmatic strategy. • Embrace risk, threats and failure. Take risks proactively rather than waiting for opportunities to emerge. Use scenario planning to better prepare and manage the risks. • Incorporate divergent perspectives – rather than relying only on funders and experts to understand the issues. This will avoid groupthink and strengthen strategic thinking. • Support the many actors doing essential work, rather than seeking to "own" the field. • Align ongoing expectations and values. Build shared goals. Avoid competition. Clarify up front how much control each funder will retain. • Reflect deeply based on values and recalibrate. Drill down to beliefs and motivations. • Recognize that big bets require a high tolerance for risk. • Ensure that the collaborative structure is nimble to accommodate changing conditions. • Promote porous learning with partners. • Ensure evaluation is adequately funded and attended to. • Incentivize listening, learning and adaptation.

Report	*Type of Report*	Recommendations / Success Factors
Glass, J. & Pole, N (2017). Collaboration between Canadian Grantmaking Foundations. *Canadian Journal of Nonprofit and Social Economy Research*.	***Journal article (peer-reviewed).*** *Literature review from published and grey literature (>100 reports), plus interviews with 23 key informants involved in Canadian collaboratives.*	• Assess the collaboration's fit and funder's own organizational readiness to collaborate • Define appropriate and aligned purpose and partners • Develop adaptive capacities • Invest in strong, trusting partnerships
Kaufmann, Brookhiser & Seeman (2018). Collaborating towards kindergarten readiness. Bridgespan Group.	***White paper.*** *Case study of a collaborative involving 6 national funders which developed an early childhood development initiative.*	• Assembling the right people takes time • A compelling goal brings people together • Learning together creates a strong foundation for partnership • Identifying and supporting champions translates talk into action • Collaborating effectively requires a serious investment of time & resources • Context informs the solution
Fine, M., Lawrence, S. & Hafid. M.S. (2018) (Re) thinking Funder networks & Collaboratives, *Stanford Social Innovation Review.*	***Journal article (SSIR).*** *Findings from interviews with 30 leaders of collaborative funder initiatives and the Philanthropy Support Organizations (PSOs) that support them. Focusing specifically on their role as the political climate changed with 2016 election.*	Collaboratives managed by PSOs can add value by accelerating action, aligning support and enabling collective voices. To be effective, these collaboratives should: • Provide funders with experts to learn about recent developments and to consider possible responses • Coordinate multi-foundation response to policy threats • Pool funding across multiple funders • Facilitate multi-funder advocacy • Nurture long-term relationships among funders
Powell A, Ditkoff SW, Hassey K. (2018). Value of Collaboration Research Study: Literature Review on Funder Collaboration. Bridgespan Group.	***White paper****. Comprehensive review of literature available through 2017*	• Pay attention to the "human dimension" / Build strong relationships • Align beliefs, goals & strategies • Mutually agreed upon governance structures • Continual measurement and reevaluation • Have exits/ends in sight • Adapt

Report	***Type of Report***	**Recommendations / Success Factors**
Powell A, Ditkoff SW, Twersky F. (2018). How philanthropic collaborations succeed, and why they fail. *Stanford Social Innovation Review.*	***Journal article (SSIR).*** *Synthesis from interviews with representatives from 25 collaboratives (10 successes and 15 failures). Focusing specifically on collaboratives where funders pool or align their funding against an agreed upon set of criteria – either to support specific grantees, to achieve an agreed upon goal, or to build a field.*	<u>General recommendations</u> • Clear "primary investment thesis" for how collective funding will add value • One thesis is prioritized • Clarify how to work together • Define how to assess value • Engage diverse communities <u>Recommendations specific to different purposes for collaboration</u> • ***Organizational funders (shared cohort)***: put grantees front and center • ***Field builders:*** change a defined field or practice set over time • ***Gaal aligners:*** Align strategies around "winnable milestones"
Jarvis, M. & Pasquarello, C. (2022). What makes funder collaboration effective, *Stanford Social Innovation Review.*	***Journal article (SSIR).*** *Analysis based on interviews with representatives of 16 funder collaboratives, each of which involved a joint investment.*	• Establish clear, measurable objectives at the outset. • Ensure that participating funders are aligned on objectives. • A clear model for decision making and trust • Right people in the room (they have necessary authority, bandwidth & knowledge) • Efficient and timely information sharing • Consistent participation • Adapt as you go • Embed utility for field partners (i.e., grantees should benefit as well as funders)
Galen, D. (2025) Reimagining Collaborative Philanthropy, *Stanford Social Innovation Review.*	***Journal article (SSIR).*** *Lessons learned by Rippleworks through its collaborative efforts*	• Share diligence reports (to expedite decision making and reduce burden on nonprofits) • Go beyond grantmaking when supporting social ventures – make external executives available to tackle operational challenges • Have learning-oriented sessions where the group doesn't feel pressured to make a collaborative decision (can build trust) • Go beyond initial funding; build long-term strategies that foster resilience and growth.
Powell A, Addy C, Martin, G. (2025). Learning from a Decade of Collaborative Philanthropy. *Stanford Social Innovation Review* <u>Summarizes findings from:</u> The Bridgespan Group (2025*). The Philanthropic Collaborative Landscape*	***Journal article (SSIR).*** *Findings from a survey that Bridgespan conducted of 310 collaborative funds (where the fund is managed by dedicated staff or an intermediary). These are:* • *Community-driven funds* • *Strategy-aligned funder collaboratives* • *Giving platforms*	• Increase awareness of work • Clarify rationale for collaborative • Clarify how fund will work with donors • Clarify how financial and non-financial resources will be deployed to achieve aims • Measure, evaluate and learn

Report	*Type of Report*	Recommendations / Success Factors
Fabyanske, J., Cook, S. & Levin, M. (2025). Collectively Owned Strategies, *Stanford Social Innovation Review.*	***Journal article (SSIR).*** *Promotes a particular approach for Strategic Alignment Networks. Illustrated through an analysis of PPATS – Preventing Pandemics at the Source.*	Alignment through narrative and vision • Assemble evidence and share perspectives from lived experience • Trace root causes & future consequences • Align on shared vision • Use narrative & vision for comms Cohesion through goals and combined strengths • Translate vision into shared goals • Map all assets and capabilities • Find additional partners • Combine comparative strengths Agility through cross-sharing and agency • Create spaces to share intel & adjust • Adopt a portfolio approach • Embrace experimentation • Build trust through action & co-learning • Nurture movement generosity