

The Art of Collaboration: Top 10 things to remember

Introduction

In the constant drive for financial savings and the focus on process efficiencies across several groups (groups could be internal departments or teams, or external organisations), working together on similar tasks and projects has become a great idea.

We hear quite a bit about collaboration and we can even see the benefits:

- Stop reinventing the wheel and duplicating work across several groups
- Stop spending the same money across the groups
- Share resources and expertise rather than trying to build the same capability in several groups
- Stream-line processes

There are variations to the above list, but why, if the benefits are so good, does it seem difficult enough for there to be so many writers and opinions out there on the subject? Personally, I think the answer is people and distrust, be it internal silos or external competition. Having been involved in successful collaboration projects, with great results, I have made the following observations.

1. Develop a clear scope and final outcome as part of the collaboration

Obviously someone has spotted a potential area where working together could be beneficial, but it pays not to start talks with a definite scope or outcome fixed in concrete[?]. The team members can't help but have a few ideas of possible outcomes, but by exploring the opportunities openly and honestly you could find the opportunity is not as big, or is bigger than initially thought. Initial conversations could also reveal other opportunities.

Keep note of commonalities and opportunities and jointly develop a clear scope, starting point and outcomes. Like any project, success is dependent on all participants having a mutual understanding of what is included, who does what and what the outcomes and benefits are expected.

2. Leave political and personal agendas at the door

This ties in with the next point too. Absolutely take into account the business drivers and directions of each participant group, but there is no room in collaboration for personal or political agendas. This is also not an opportunity to spy on the competition.

Being honest about organizational direction, business drivers and culture builds trust and understanding. Each member represents their own group, but as a team you are working together to achieve a common goal.

Political and personal agendas tend to involve secrecy and covering your own butt [re-phrase?] at the expense of others.

3. Leave the CEO at home

The CEO's focus on organisation direction and future strategy does have an important role in collaboration, however the nuts and bolts of how organisations can work together is best done a little lower down, by staff who not only know the business processes, but who also know the culture and organizational direction.

Many CEOs respond well to projects that can save money or work, but there is a difference between a high-level statement like "let's save money by sharing the same financial management system", and the people lower down knowing where they need to create a greater commonality in business processes and also what

organizational differences need to be kept and why. One system could cater to all, but each installation may not be equal.

4. But ensure a good level of authority

Whoever is used to discuss collaboration needs to have some decision-making authority in the area. It is hard to work with others if everyone has to keep saying "I have to pass that through my manager". With decision-makers together, options can be discussed and everyone can build a good picture of what could be workable, and the various skills that each participant can bring to the table.

5. Make sure there is sound governance

Like any project, there needs to be someone with oversight of the work being done. Collaboration projects should probably be signed-off by the CEOs, and there need to be effective processes in place to ensure there is sign-off, funding and reporting.

The CEOs will need to know where collaboration could be useful, the scope of that work and the benefits that are expected from it. This governance level is also to ensure that focus and scope are maintained and that benefits are realized or the work stopped. No collaboration project will last long if there are no real benefits to all groups.

6. Don't get hung up on total equality

No collaboration is going to produce equal benefit to all participants, however, so long as all participants are getting reasonable benefits that could not be realized without collaboration, then the inequity shouldn't be a problem.

The investment into the collaboration effort could also cost each participant more or less than others, but again, so long as the benefits outweigh this cost and everyone is gaining, then this inequity should be workable.

It is like any successful relationship; one participant may gain more in one area, but gives more in another. Don't forget, benefits could range from:

- Direct financial savings though greater buying power and sharing resources

- Reduction in duplication of resources and processes
- Sharing of templates, development work and staff expertise and experience

A bit of give and take goes a long way, but balance this with ensuring one participant isn't being overused without compensation. Generally, there are different skills sets available across the groups, so you can all contribute.

7. Allow others to be different

Even if your organisations are competitors in the same market, all the participants will have different business drivers, goals, values and cultures. Each organisation will also have different levels of experience and expertise in the area being collaborated on. These are not necessarily barriers.

Each group brings something different to the table and does it really matter if one of you has a compulsory template, for project reporting for example? Use it and move on. Don't worry if you all have templates because it doesn't take long to cut and paste the same information into the various boxes. Will a little extra effort allow you to include individual needs as well as joint needs?

Differences of opinion are bound to arise, but so long as there is little effect on the outcomes, accepting an alternative builds respect and keeps the focus on the benefits for all participants.

8. Mix and match different collaboration types

As I have said, not all collaboration is created equal. There are three main types of collaboration:

- Where one participant has experience and expertise and could take the lead by passing this knowledge on. Benefits could include:
 - Kudos for the lead group, which could lead to further work for them
 - Maybe some payment to the lead group by other participants who get the skills more cheaply than on the open market
 - Builds up the experience and skill in the other participating groups, leading to an increased possibility of further collaboration in the future

- The work is done jointly where all participants possess similar or complementary skills that negate the need for expensive contractors and where there is limited staff time. Benefits could include:
 - Saving costs on external providers
 - Saving time on repeating the same work at each organisation
 - A consistent foundation on which to build other opportunities
- Use of an external expert to do work, where none of the groups have the time, skill or expertise. Benefits could include:
 - Financial savings from having all participants being given the same expertise at the same time
 - Consistent messages and training across all participating organisations – lessens confusion
 - A consistent foundation on which to build other opportunities

9. Be open and honest – the CEO may cringe but ...

The CEO won't be at collaboration group meetings, so it is OK to tell a few stories and be honest about your organisation's environment - both strengths, and weaknesses. Use stories to illustrate what you are saying, and be open about your concerns and worries at work. Some humour is always good. This builds trust, respect and understanding and goes a long way to improving collaboration.

However, there are boundaries. Rumours are just that, stay away from them and if they do come up, treat them as rumours. Stay away from exaggeration and making things personal too, as this doesn't help any relationship let alone between competitors. Stay professional, be mindful of commercial confidentiality and embarrassment to co-workers, and remember, what is said in your meetings, should stay there. As this is difficult to enforce, building trust is vital.

10. Communicate, communicate, communicate

Basically this is about avoiding assumptions about the other

groups. Check your understanding, and where appropriate gather evidence of agreement. This could be done in several ways such as:

- Keeping meeting Minutes
- Using 'track changes' on documents
- Phone / conference calls
- Email conversations
- Memorandum of Understanding, contracts and terms of reference

Take time out to be social or at least informal with each other as individuals. This could be as simple as catching up on how children are going or how busy people are at work, to going out to lunch. This builds more personal trust and maybe even some friendships.

Once again, you are a team working towards joint outputs of benefit to all groups. Make sure you are on the same page and work at the collaboration and not the individual level.

Final Note

Find a way to capture what you have learnt about collaboration, what worked, what failed and how you fixed issues. No two collaboration teams are going to be the same, but learn from your experiences so that you can at least start each effort with a sound foundation.

Archives and archivists in 20th century England

Elizabeth Shepherd

FARNHAM: ASHGATE

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This book makes compelling reading. The four themes of the book are government policy and legislation, the emergence of a distinct occupation, the development of professional associations and the provision of archival education. Each theme has two chapters devoted to it, which subdivide the topic chronologically.

If you are anything like me, you will have wondered what has happened in England over the years and why recordkeeping in Australia and New Zealand has developed along such different paths. This book provides the answers, and it really is a 'must read' for anyone interested in understanding the global dimensions of the archives profession. Tensions between historians and professional archivists resonate throughout. Similarities to our environment are apparent in the influence that Shepherd describes as being exerted by individuals, rather than a more societal and cultural embeddedness of the understanding of the importance of records. Shepherd describes an overall absence of leadership for the archives profession up until the late 1950s, and notes that the vacuum was filled by 'local enthusiasts and forceful individuals' (p.213). Similarly, that 'individual enthusiasms and local vagaries of politics and funding, rather than central government leadership or legislative legitimacy shaped local archives' (p.217).

The account is very much an insider's perspective. Elizabeth Shepherd was Programme Director of the MA in Archives and Records Management at University College London (UCL) until 2002, and is now a Reader at UCL. She is particularly well placed therefore to comment on the development of educational qualifications. Programmes at London, Liverpool and Aberystwyth are discussed and the recent appearance of Northumbria on the educational scene is described. She does not flinch from critical analysis of her subject area, and one of the most interesting sections relates to the description of the calcification of education that occurred at some universities. At Liverpool University a more records-focused approach to education introduced by Michael