

COLLABORATING FOR SUCCESS II: Creating and Operating Multi-Tenant Nonprofit Centers – May 15-16, 2003
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Presenters: Alex Zwissler (moderator), Fort Mason Foundation, CA
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Joseph Connor, The Collaboratory for Community Support, MI.

Alex Zwissler: Introduction of Jay Conner who is the Founder and CEO of The Collaboratory for Community Support.

Joseph Connor managed a multi-tenant organization in Ann Arbor Michigan, the New Center. Leah is the property manager for The New Center. In the early '90's he realized a tremendous amount of opportunity that the partnerships that exist and have the potential to exist, have as it speaks to the community as a whole. He has been heavily involved in research and teaching and consulting with communities across North America about community systems on how to get real impact whether it's homelessness systems or child and youth services systems. One strategy that he works with and has been very successful is a multi-tenant environment which he views as a broad community system, community impact vantage point. He starts at that macro level and how that impacts in decision making. He quotes Francis Ford Coppola saying the only difference between making a good movie and a bad movie is that everybody has to be making the same movie.

- Discussions in terms of multi-tenant units.
 - How to be successful?
 - There needs to be a shared sense of what the vision is, of what you're trying to accomplish.
 - Be intentional about it. How do we articulate the things that we value, what are the things that we're trying to accomplish with this building?
- In any complex operation there isn't a right or wrong answer. The most important thing is asking the right questions.

- Trends have been developing over the last decade that develop in parallel with the development of multi-tenant centers.
 - The amount of multi-tenant centers will at least double if not triple within the country in the next few years.
 - Because multi-tenant centers work.
 - Multi-tenant centers have powerful opportunities for impact.

- Other trends that are moving and motivating those multi-tenant centers to occur are,
 - Local controlled evolution. How to move a sense of ownership for community systems to local level that creates responsibility at the local level.
 - Thinking about better ways of doing things.
 - Information and collaborative technologies.
 - Sharing data,
 - Case management across organizations. It's easier to get information flowing.
 - Good experiences in terms of being successful.
 - Higher sense of expectations within our communities
 - Follow through and expectations that comprehensive opportunities like multiple tenant units have powerful measurable outcomes within the community.
 - Much stronger work in understanding how space can amplify system, how the usage of space can be a very powerful strategic resource within a community.

- The context of budget cuts forces you to be more creative in terms of how to use the resources and the dollars that we have.
- Types of strategic issues that should be asked very early in the process. There's range of choices on a continuum. None of them are right or wrong but they need to be addressed up front so that people understand that this is exactly what we're trying to accomplish in this space.
- One of the opportunities that multiple tenants centers present is in most cases there's a real shared ability to lower cost.
- Another opportunity that multiple tenants centers present is to have shared outcomes within the community in terms of the tenants that are in the building, the way those tenants are chosen, the kind of systems and the kinds of collaborations that are created within that space.
- Multi tenant centers can be extremely powerful in a community no matter where you are on that continuum but it's very important to ask and to understand where you are on that continuum. Your point on that continuum can change.
- Thinking of all those different kinds of continuums is an important part of that process of understanding who you are and how you engage your community in terms of services that you provide as well as fund raising efforts that you would like to have.
- There needs to be a good strong understanding of the difference between operating the center and leveraging what it represents within the community.
 - How is the center going to be operated?
 - What is the relationship between the center operator and the tenants?
 - How do we leverage the results of this to the community?
 - Thinking about those separate sets of questions is important.

Joseph Connor gives an example of two different parts of the same equation between operating the center and leveraging it to the community with The New Center when it originally came into being as an incubator for new non profits. One of the things they realized in its 2nd strategic plan cycle is that The New Center didn't resonate strongly with the community. The community felt it had too many nonprofits already. They had to think in terms of how they position The New Center in a different way in terms of leveraging that discussion with the community and they still had a very real market business issue in terms of how they continue to fill the space within the center.

Shelley Hamilton: Another example is the Thoreau Center for Sustainability in terms of leveraging it to the community. It was the first major development in the Presidio National Park which was turned over to be a National Park from a military base. Leveraging it in that community meant to say here's a success of what has happened in the park that could happen in the rest of the national park really trying to leverage that model as a success model for the rest of the park.

Joseph Connor: Some of the types of purposes that have been represented in the various discussions here.

- A good sense of shared feeling about the purpose.
- Leveraging fundraisers and operating costs.
- Economic development.
 - creating this community space.
 - providing non profit recognition and support within its community
 - fostering a stronger sense of community engagement.

Joseph Connor gives an example of how you balance the presumptions that you would have about a center in the beginning and the implications of those presumptions.

- The first part is this is a governmental organization that's looking to develop a multi-tenant location. And it has three presumptions.
 - To see this center as really valuing the inner connection, valuing the systemic work much more than the silos and the fragmentation that existed with the community before,
 - wants to work and empower and resource moving towards preventions and outcomes versus just the kind of transaction problem related activities that existed to a large extent before.
 - And it sought to create an alignment across boundaries, departmental, organizational and sectoral.
- Then it had to address that that means the roles and relationships have to change. There needed to be a very powerful sense that this center, these expectations, these presumptions was going to change the nature of how we conceive our roles and how we conceive our responsibilities within a community.
 - Who does what best?
 - The center became the enterprise, becoming the enterprise as opposed to fragmented out within the individual organizations within that center.
 - One of the real intents of having these discussions about roles and responsibilities up front is really to get the kinks out before the mortar sets.
 - The center is a mechanism to be able to get solutions. The ideas and the intents of how organizing our work within that center is what gets to solving the problems.
 - The center itself isn't the answer, it really is that work in terms of what we're trying to accomplish and then how that center helps further that work that should be the way that takes place within communities.

- The present state is most of these organizations are dispersed throughout the community. They have foundations that are coming from different parts of the community, some regional, some local, from that present state to that desired state of solidified clear action, clear roles within the center, you need to ask the question what are they going to do about structures, processes and indicators to be able to say that work is being done differently as a benefit of that center. If we're asking the center to kind of change the nature of our outcomes and our impacts in the community we need to say how are they're going to function differently. And that's a discussion that has to be at each of the board tables of all of the potential partners within that center, at the sense of how that center is organized is really essentially go down and say how are we changing our structures, our processes and our indicators to be able to get that highest level of impact off that center.

Alex introducing Shelley Hamilton, founder and principal of Net Centric Designs & Business Strategy, Team Facilitation and Organizational Design

Shelley Hamilton: In terms of process, multi-tenant non profit centers are extremely complex. Partnering people, bringing people together to work together who haven't worked together before. And all of the data and facts that you have to have and keep in mind around real estate issues and your financing issues let alone your mission issues.

- Thinking about vision and purpose and planning, trying to find a process that works.
 - Use visual stuff because it's a way of representing a complex system all on one page to see what each other's contributions are and have it all on one page. You can follow it up with the details behind it but you'll be able to have a snapshot of the conversation or the points.
 - Use other process dialogue processes, set up the environment so that you can have those conversations. When you're talking about complex issues you really need to do something different if you're talking about doing something different.

- At the core of all strategic planning and visioning is really looking at what is your purpose because that's going to drive a lot of your other decisions down the line and through your strategy planning process. Ask what is the purpose of the center? Identify a few of the general purposes like cost, sharing the affordable, stability and mission enhancing. Add programmatic integration onto it. move up into programmatic themes, art centers, environmental centers or incubators or economic and historic rehabilitation centers or economic development centers. Get more complex, you might be adding more shared services and those kinds of things to it. If your purpose is a more focused. coordinated client and community services you're really talking about programmatic organizational integration beyond just the walls of the building.
- The process for doing the visioning process and the ongoing planning process the path here goes around and around and around, Its not a one time deal. It's never too late to start. In fact you shouldn't only do it at the beginning it should be an ongoing process with checkups along the way. Y
 - Embed the process into the organization not just the outcome of the vision statement or the mission statement.
 - Be very intentional if you will about the process and figuring out how you want to carry on that process into the future.
 - So part of the process is this goal setting, looking at what objectives, knowing when are you going to be successful and doing some ongoing self evaluation as you continue on..
- The current reality: where are you right now and who are the constituents that you're working with.
- Some large areas that you'll want to be looking at.

- Looking into the future. Looking at sustainability and what are the elements of sustainability.
 - economic sustainability,
 - social sustainability
 - programmatic missions of all of the organizations and the purpose of the center and the people who actually inhabit the building.
 - environmental sustainability, and the physical infrastructure sustaining that. Your capital reserves, all of the maintenance, the ergonomics of where people live, the community spaces,
- Take your factors you've assessed in your current reality, engage yourself in a process, and develop objectives out of that that help you get to the vision that you have for your center.
- When doing a planning process partner with process folks to evaluate and look at these issues with content people

Joseph Connor: One point on that is those are most likely different sets of people. As a complex enterprise, you're going to probably have different sets of experts that you're going to need to bring in at different points in time.

Alex Zwissler gives an example of how the Fort Mason foundation looked at the whole strategic planning issue and actually working a consultant.. Fort Mason Center is essentially an arts and cultural and recreational center within a national park. What was the purpose of our plan? Why did we set out to redo this and again this was in like the 23rd or 24th year of our operation? The process that we went through, how it's related to our mission and how that remains a focus of what we're about and share the vision for the future and some next steps.

- The purpose of the plan. It was a statement of intention. It provided focus and direction. It was also an invitation to join us and finally it was just an impetus to action.
- The process. We formed a committee of the board but also brought in staff members and members of the resident community and also our primary partner the national park service. Its really important to be transparent and do everything up front and have as much buy in as you can because otherwise you'll be dealing with the consequences on the back end. We assessed the current reality. It was a comprehensive process where through a number of personal interviews, focus groups, surveys, etc, we took a reading of how the community viewed Fort Mason. From that there emerged a number of themes which we focused the plan around and that then resulted in the division and strategies.
- Fort Mason's mission. To create and preserve the cultural, educational and recreational center that reflects the history talents and interests of the people in the Bay area in partnership with the national park service. And we really live this every day. Our as a center it is both enhanced and complicated by the fact that we are within a national park, we are national historic landmark so we have to comply with the secretary of the interior's historic preservation standards. That adds cost to anything that we do in terms of upgrades and preservation. But again this sort of explains a little bit about Fort Mason in this notion of reflecting the history, talents and interests. We don't program the center. The community decides what comes in. we facilitate it, we help promote it, in some cases we help fund it and underwrite it through various grant programs we have.
- The outcome, we developed a vision for the year 2006. We talked about the emerging themes of relationships with our various partners and stakeholders, our internal operations and governance issues that we had to struggle with, our financing issues in terms of our future aspirations for the preservation of the facilities which is the next phase around the vision and then our identity and use, how is the center used and how are we perceived.

- All of this defines the long term vision. Hanging off of each of these points under the various themes are a set of strategies and then under those strategies are a set of measures of success that in total form the strategic plan. This was done at the end of 2001 and already we're looking at revisiting the plan again saying how have we done for the first couple years, what do we need to tweak, do we still believe everything we said.
- One of the key next steps is to share the plan. We've had a number of community meetings where we've shared it with our residents and other groups actually doing what it says and then regular updating .
- So that's what Fort Mason did in terms of looking at its strategic issues. And this is again, well into the lifecycle of an organizations.
- Our key challenge going forward is that the park has not been able to provide funding for the preservation of the buildings, many of them are seriously deteriorated so we're looking at taking on that responsibility in exchange for a long term lease agreement for the center.

Question & Answer:

Question: Is this the plan or just the vision?

Alex Zwissler: That's just the vision statement. The plan is how do you get to that vision, what do you do to make it happen and how do you say that you've done it.

Question: How difficult is it to get the board to commit to the time for the plan?

Alex Zwissler: It's a leadership issue. It has to come from the top, the board chairman has to make the commitment and in our case they did and were at all the meetings. Leadership is the key

Joseph Connor said this is especially true when you're thinking about revising a plan. That in typical organizations over time the board is doing less and less consequential work. What can we strip away, how can the board really focus on its true task?

Question: Do you find that the earlier stage in terms of the lifecycle of organizations, the organizations tend to have boards doing somewhat staffish work and as they mature that's when the board tends to be freed up?

Joseph Connor: Absolutely right. The dilemma though is that working board which is that first couple lifecycle boards can move into a bureaucratic board which has all of these committees. And the biggest test that I say if I'm looking at a board is if you have committees that line up with staff positions that you have, then why? That's not the work of the board, you've hired staff people to do it.

Shelley Hamilton: The other thing too is building in a board transition because when you're building your board in the beginning you are building in some of those staffish functions but you need to have a plan for succession planning so you can ease the transition.

Alex Zwissler: The way we institutionalize that, we have term limits on our board. Three, three year terms and then they have to leave.

Question: When you're developing the shared vision with other tenants, what are the landmines and are funding sources one of them?

Shelley Hamilton: One land mine is be very clear about participation and what kind of participation you're asking folks for. Is it binding voting agreement, are the tenants going to vote on the vision? Are they just giving you input? Is it an advisory capacity? So that you don't create mixed expectations not just from the tenants but all the other people who are either coming to the table or coming to the various tables to that you're very clear what type of participation folks are having in the process.

Joseph Connor: The biggest landmine is not acknowledging that there's going to be landmines.

Shelly Hamilton: One of the values of bringing in an external 3rd party to facilitate the process is they can point out the “elephant” in the middle of the room without fearing reprisal.. They can also create a safe environment. A good consultant can help people feel safe in dealing with some of those tough issues.

Joseph Connor: This is different than a lot of collaboration that we just take for granted that’s been talked about in terms of the letters of support to funders and that type of stuff. So when you’re thinking about bringing in an expert, make sure that they understand the complexities that are involved in that.

Shelley Hamilton: And to answer your question, funding yes, that’s probably always the elephant in the room. That is always going to be an issue.

Question: Over the years action plans, strategic plans, business plans, project models, outcomes and indicators and inputs and outputs... we have a strategic plan, any thoughts about what kind of planning is most useful? If somebody were starting fresh would you say do a strategic plan that has a business planning element? Any comments on all that?

Alex Zwissler: Okay why do it and where do you start? I think you have to answer that questions for yourself, I think it goes back to the lifecycle of organizations but the answer is we felt we were at a point where it was important. We’re facing some major decisions on which way do we go in terms of the future, we about to enter a new long range agreement with the park. And part of it is the other reason is that the funders may want to see one, have these people thought through the issues, do they know what they’re about? And that’s why you do it.

Shelley Hamilton: You can talk about really core elements that aren’t timeline related or objective related or outcome related that can allow some flexibility there. So you can go back to your overarching vision which brings everybody up a notch and go down to your fundamental values and say does this really fit with our values in terms of when an opportunity comes up. The goals and objectives those parts are going to change so you can come back to underlying values, your purpose and your mission and use those as your guide posts.

Joseph Connor: How do you move towards strategic thinking as opposed to strategic planning so that you're on going relating to that. Change is the given, so how do we do that ? I move more towards the strategic thinking that doesn't get you away from the business planning and the strategic planning but it gives a sense of dynamic to it. The other thing that I think it very important is what is the simple believability test. Ultimately it's how you're going to engage and how you're going to move out into the community. You have to have the same message. What is the real representation of what we're talking about?.

Shelley Hamilton: Leadership in terms of acknowledgement when things are being accomplished is important. Leadership is reminding this operational stuff is a manifestation of our values and vision. Connecting the mundane with the visionary part is a communication role with leadership.

Question: Can you do it internally or do you need outside help?

Shelley Hamilton: It depends on what kind of skills you have, it's harder to point out the "elephant" in the room if it's internal.

Joseph Connor: About half of our work is through organizations seeking that kind of support to be able to do that. It's extremely difficult in a complex situation to be on the inside trying to reflect what the outside needs to know. Also timelines in organizations are much longer then they need to be.

Question: How important is PR, getting press attention so that the general public knowing about this concept either in the planning stage or after it started and second how important is going to the municipal our county government early on to get referrals, credibility?

Shelley Hamilton: Are you talking about knowing about it in terms of the general concept of multi-tenant centers or knowing about your specific center?

Alex Zwissler: We have a director of communications at the center and I think PR and outreach is

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