

**COLLABORATIVE AGENTS IN THE DISCOVERY INITIATIVE
AS OF MID-2007
Report to the William Caspar Graustein Memorial Fund**

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This report was prepared by the Discovery Initiative Evaluation Team for the William Caspar Graustein Memorial Fund in February 2008. The information used in this report was collected in the summer of 2007. Further details on the data collection are presented in the report.

We appreciate the input and feedback of the Memorial Fund staff, the members and staff of the Discovery community collaborative groups, and staff of the organizations serving as collaborative agents for these collaborative groups. The analyses and conclusions in this report solely reflect the perspective of the Evaluation Team.

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COLLABORATIVE AGENTS IN THE DISCOVERY INITIATIVE AS OF MID-2007

INTRODUCTION, HIGHLIGHTS & IMPLICATIONS

Since its inception in 2001, the Discovery Initiative has provided supports to 49 Connecticut communities that have organized 47 collaborative bodies working to develop and implement local action plans to improve the early school success for children from birth through age eight. Supports offered by the William Caspar Graustein Memorial Fund in the Discovery Initiative have included grants, technical assistance and training, resource materials and tools, and peer exchange opportunities. In addition, the Memorial Fund required that the collaboratives engage and document the commitment of key people in the community, including the mayor, superintendent of schools, School Readiness Council, parents and the organization serving as the local collaborative agent. The role of collaborative agent was intended to be broader and more engaged in the work of Discovery than that of a traditional fiscal agent. The collaborative agent strategy was intended to provide the local collaborative groups with additional infrastructure and resources during the course of the Initiative and with the potential for longer term support within the community after the Initiative.

This report describes and assesses the role of collaborative agent within the Discovery Initiative from two perspectives – of representatives from organizations serving as collaborative agents in mid-late 2007 and of community coordinators in the summer of 2007.¹ The report includes both summaries of the numbers and percents of collaborative agent representatives or coordinators giving specific responses to open-ended interview questions, and quotations from collaborative agent representatives that illustrate the range of responses given on key topics covered in the report.

The introductory section of the report begins with the description provided by the Memorial Fund of the responsibilities of the collaborative agent. This description was developed early in the Initiative and redistributed as part of the 2008-2009 application support materials in May 2007. Highlights of major findings are then listed, followed by some implications for the Discovery Initiative with regard to the role of collaborative agents. The introductory section ends with a brief description of methods by which data for the report were collected. Following the introductory section are detailed findings organized by research question.

¹ There were a total of 38 organizations serving as collaborative agents for the 47 collaboratives in the Discovery initiative in the summer and fall of 2007. Eighty-seven percent (33) responded to the survey, which was conducted by telephone. The participating collaborative agents represent 40 (85 percent) of the 47 collaboratives. All but two of the 47 collaboratives were represented by telephone interviews with local coordinators and sometimes additional members of the Discovery collaborative group, conducted in the summer of 2007.

The Role of Collaborative Agents as Described in Discovery Initiative Documents

The Memorial Fund as a foundation gives grants to 501(c)(3) private not-for-profit organizations. Therefore, it asked communities applying for Discovery grants to identify such an organization to be its agent. The Memorial Fund described the collaborative agent, as follows:²

A private not-for-profit 501(c)(3) organization, accepting responsibility as agent for the Collaborative. Agent is defined as “a person or institution acting on behalf of another; a representative.” The collaborative agent accepts responsibility for the management and fiscal support required to sustain collective action and accountability for the status of children and families by the Collaborative. No branch of local, state or federal government can act as collaborative agent for the purposes of the Discovery Grant Program.

In addition to this description, the Memorial Fund also provided details on the responsibilities it expected collaborative agents to be able to assume:

<u>Responsibility Area</u>	<u>Description</u>
COLLABORATIVE SUPPORT	<i>Possesses the ability to work with parents, schools and related health and human services providers. Experienced in the provision of management support to comprehensive community based initiatives. Understands the process and importance of increasing and sustaining community engagement and parental involvement.</i>
FISCAL AND PROGRAM-MATIC SUPPORT	<i>Receive and manage grant resources at the direction of the local leadership group (Collaborative).</i> <i>Provides the local leadership group with the staffing and other services that are necessary in support of collaborative actions.</i> <i>Must be fiscally sound and responsible. All management controls must be in place to administer the grant award, especially the conduct of a yearly certified audit.</i>

² This description was taken from information provided in the notebook given to community representatives attending the May 22, 2007, application information session for the Discovery 2008-2009 grants. This official description is not currently included on the Discovery website or in the glossary.

Experienced in the management of subcontracts for services, multiple interagency agreements and cross agency staff management and redeployment.

Able to account for redeployed and in-kind matching resources to the Collaborative.

Administrative contact point for the Discovery Grant Program and Memorial Fund staff.

Experience with children, ages birth to eight, and their families.

Highlights of Major Findings

- Three types of organizations – United Ways, local foundations, and service providers – constituted about three-quarters of all collaborative agents as well as of those participating in the interviews.
- More than two-thirds of responding organizations had served as collaborative agents since the beginning of Discovery, and almost all of the others had done so for the past 3 or 4 years.
- About half of the interviewed collaborative agents believed that the broader role of the collaborative agent in the Discovery Initiative was not well-understood, especially at the beginning of the Initiative; another one-fifth did not know enough to comment on this. About half had not understood that role themselves when they took it on.
- About 8 out of 10 collaborative agents now understand that their role goes beyond fiscal management of the Discovery grant. Frequently mentioned aspects of that role included bringing others to the Discovery table, facilitating collaborative processes, participating in planning and governing activities, and being involved in Discovery's substantive work. These were echoed by the Discovery coordinators as the most important ways in which the collaborative agents were expected to or had contributed to the work.
- Almost three-quarters of interviewed collaborative agents described their mission as closely aligned with the work of Discovery and almost 9 out of 10 believed that their organization was well-suited to serve as collaborative agent.
- At the same time, almost 60 percent of those interviewed believed that their organization's capacity to perform the role of collaborative agent was limited, due to the time required and/or their limited staff.

- About 80 percent of collaborative agents were members of the Discovery group in their community, regularly attended meetings, and participated in some way in decision-making. This was an expectation for collaborative agents explicitly mentioned by more than half of Discovery coordinators.
- Just under 70 percent of collaborative agents provided some additional support, beyond financial management, to the Discovery work.
- Almost 9 out of 10 collaborative agents believed that they had contributed to the success of Discovery in their community. Just as many also believed that their organization had benefited by participating in Discovery.
- Overall, two-thirds of those interviewed believed that the collaborative agent strategy was a good idea and more than three-quarters reported that it had worked well in their community. This was echoed by the majority of Discovery coordinators, two-thirds of whom reported no problems or concerns with the performance of their collaborative agent.

Possible Implications

The Role of Collaborative Agent Going Forward

While much better understood than in the beginning of the Initiative, some confusion remains about the expected role of the organizations agreeing to be Discovery collaborative agents, both during the Initiative and beyond. Representatives of the current collaborative agents noted that they learned about these expectations during the course of their work. But they also noted that certain sources were particularly helpful to them in that process, particularly written materials, meetings of the collaborative agents, and conversations with Memorial Fund staff.

- This suggests that continued information, communication, and opportunities for peer learning on the current and possible future roles for the organizations serving as collaborative agents in the Discovery work would be valuable.

Many collaborative agents, including those that wanted to and had fulfilled a broader role than fiscal management only, were feeling the strain of time and staff required to both handle finances for the collaborative and participate in other ways.

- Collaborative agents, especially smaller organizations, might benefit from technical assistance and infrastructure support. As one mentioned, “Because we’re small, I don’t think we get enough attention and support. I believe that if the foundation wants to get these projects going in all these communities, they really need to back that up. What they are asking can be difficult.”

Most collaborative agents and most coordinators believed that their partnership was successful and was benefiting Discovery’s work, and most collaborative agents provide

some support, although not monetary, for the work. However, as noted below, this is not universally understood as an ongoing role past the grant period or a strategy to make the collaborative work permanent in their community.

Communications about Memorial Fund Strategies and Expectations

Many of the collaborative agents – even those who had been involved from the beginning of the Discovery Initiative – expressed surprise when the collaborative agent role was described during the interview as a deliberate strategy on the part of the Memorial Fund to build longer-term institutional support for the work in the Discovery communities. In fact, the published description of the collaborative agent qualifications and tasks is not explicit about this goal, as it has evolved as the Initiative has progressed. It appears that most collaborative agents truly began to understand what their long-term role could be through conversations with Memorial Fund staff and each other during the course of the Initiative and as the work developed in their communities.

This experience highlights an aspect of the Memorial Fund approach that is both an asset and a challenge – that is, its willingness and ability to listen, learn and evolve its thinking and its strategies during the course of its work. This is certainly an asset that many community members as well as statewide grantees and other observers have noted. It has allowed the Memorial Fund to help community groups and organizations to grow into the work, for the Fund and its community and statewide partners to learn together, and for the Fund to be responsive to changing circumstances and emerging interests and needs. It is an important basis for the respect and trust that the Memorial Fund enjoys throughout Connecticut.

At the same time, it may be difficult for the Memorial Fund itself to recognize how its strategies are innovative and evolving. Keeping all involved abreast of its current thinking may be especially challenging with so many communities and organizations as partners in the work over such a long period. It appears that, while the foundation for the collaborative agent strategy was laid out early in the Initiative, its long-term goal for that strategy may not have been clear. Nor had there been experience to draw on in the community-building field about turning what would traditionally have been a relatively limited fiscal role for the organization receiving grant funds on behalf of a local group into a broader role as a long-term institutional partner in change. As the Memorial Fund continues with the Discovery Initiative, it may want to consider how to capture its own learning and evolving thinking and how to share that more explicitly with its partners.

Overview of Methodology

There were a total of 38 organizations serving as collaborative agents for the 47 collaboratives in the Discovery initiative in the summer and fall of 2007. Eighty-seven percent (33) responded to the survey, which was conducted by telephone. The participating collaborative agents represent 40 (85 percent) of the 47 collaboratives. All but two of the 47 collaboratives were represented by telephone interviews with local

coordinators and sometimes additional members of the Discovery collaborative group, conducted in the summer of 2007.

The distribution of participating collaborative agent organizations mirrors that of the total, indicating that the responses of the participants are likely to represent the range of experiences of all collaborative agents. (See the distributions of all collaborative agents and of collaborative agents participating in the interviews in Part A of Detailed Findings, page 7.)

DETAILED FINDINGS

A. What organizations were Discovery Collaborative Agents in mid-late 2007?

Type of organization

The Discovery collaborative agents included a diverse array of types of organizations, as shown in the table below.³

- The largest single category were **local United Ways**, which were more than one-quarter of all collaborative agents as well as of those interviewed.
- **Community service agencies** – providing either early childhood education or other social or health services – also represented more than one-quarter of the collaborative agents.
- **Local foundations** – either community foundations or educational foundations – represented about 20 percent of the collaborative agents.

These three major groups – United Ways, local foundations, and service providers – totaled about three-quarters of all collaborative agents. The remaining collaborative agents were other community organizations, the regional education service collective, or local churches.

Type of Organization	All Collaborative Agents	Collaborative Agents Participating in Interviews
United Way	10 (26.3%)	9 (27.2 %)
Community Foundation	3 (7.9%)	3 (9.1%)
Educational Foundation	5 (13.1%)	3 (9.1%)
Early Education Provider	4 (10.5%)	4 (12.1%)
Other Service Provider	5 (13.1%)	5 (15.2%)
Church	3 (7.9%)	2 (6.1%)
Other Community Organization	4 (10.6%)	3 (9.1%)
RESC	4 (10.6%)	4 (12.1%)
TOTAL	38 (100%)	33 (100%)

³ The distribution of participating collaborative agent organizations mirrors that of the total, indicating that the responses of the participants are likely to represent the range of experiences of all collaborative agents.

Length of time serving as collaborative agent

More than two-thirds (69.7 percent) of the collaborative agent organizations that were interviewed had served as collaborative agents since the beginning of Discovery. Just over 20 percent (21.2 percent) had begun acting as collaborative agents midway through the Initiative, usually in 2003 or 2004. Two had begun recently (within the past year or so), and one reported that the length of time varied, depending on the specific community, since they were collaborative agent in several Discovery communities.

B. How well was the role of Collaborative Agent communicated and understood?

Collaborative agent representatives were asked about the idea of using a collaborative agent rather than a standard fiscal agent as part of a strategy to build long-term institutional support for the work of Discovery in the communities. Many representatives from the organizations serving as Discovery collaborative agents believed that this expectation for their role had not been well described or well understood.

- Under one-third (30.3 percent) reported that this was well understood.
- Almost half (48.5 percent) believed that there was considerable confusion about the collaborative agent role.
- One-fifth of the individuals interviewed did not mention anything specific about this issue -- five collaborative agents did not address this issue at all, and two said that they weren't sure about the role.

Representatives from organizations that had served as collaborative agents from the beginning of Discovery were no more likely to believe that this role was well-understood than those from organizations that became involved at a later point. Nor did representatives from any type of organization (see earlier list) express significantly greater understanding of the collaborative agent role than other types.

<i>TYPICAL STATEMENTS FROM COLLABORATIVE AGENT REPRESENTATIVES ON THE CLARITY OF MEMORIAL FUND MESSAGES ABOUT THE COLLABORATIVE AGENT STRATEGY</i>
<i>I don't think they were clear up front. [We] signed on as a fiduciary and didn't have the resources to be the collaborative agent.</i>
<i>The message was loud and clear.</i>
<i>The Memorial Fund made it clear that our role would be as fiduciary but the role changed in the middle; the collaborative agent is expected to be much more than we had expected.</i>

TYPICAL STATEMENTS FROM COLLABORATIVE AGENT REPRESENTATIVES ON THE CLARITY OF MEMORIAL FUND MESSAGES ABOUT THE COLLABORATIVE AGENT STRATEGY

Expectations were not clear. There was a vision of what a collaborative agent should be but the role of the collaborative agent was not articulated prior to us signing on.

I don't understand the expectations...What is the agent expected to do? I have seen more recent publications, saying they want the agent to be more active...I don't really know what this means.

I think it would be very helpful for the foundation to come up with a more clear and detailed description of what the agents are expected to do. The intent seems very prescriptive. If that's the way it's going to be managed, that's something we need to know about from the beginning.

I don't think that, if that's what they are trying to do, it's ever been stated that way. It can be confusing how Graustein presents things. I have to admit, when I first learned about this, I thought our role was just fiduciary.

Still trying to sort that out. One of the concerns I have is that no one has ever said, "This is what we want the collaborative agent to do." It was positioned to me as a fiduciary agent. When I got here, I was told that the collaborative was more of a tenant in our building than a part of our mission.

It's hard to understand what the Memorial Fund wants, we get no direction from them whatsoever.

It wouldn't have made sense to [describe the broader aspects of the CA role and the long-term goals of the strategy] and ask for a long-term commitment to something we hadn't tried yet. But as the process went on a more open discussion would have been helpful.

We thought collaborative agent and fiduciary were the same; over the years we have been challenged to do more. If we knew then what we know now our decision to be a collaborative agent would not have been different, [but] we might have been a better partner with better planning up front and more staff time.

I think Memorial Fund needs to think about whether it has been overt enough about communicating the expectations.

TYPICAL STATEMENTS FROM COLLABORATIVE AGENT REPRESENTATIVES ON THE CLARITY OF MEMORIAL FUND MESSAGES ABOUT THE COLLABORATIVE AGENT STRATEGY

When we started this, there was a job description of what the collaborative agent's role was. It has stayed pretty consistent throughout the process. That job description clearly communicated the role.

It does come as a surprise to me. I didn't know this was a specific strategy of theirs. I don't know if certain collaborative agents could meet the challenge of keeping this sustained, so I would have liked the Memorial Fund to give us some more training and support to work with all of the partners of the collaborative to sustain it.

I think the Memorial Fund put out a nice list of tasks that was pretty clear cut. It just evolved from there.

About half (48.5 percent) of the individuals interviewed as representatives of the collaborative agents reported that they had not really known or understood that role when their organization took it on, although they believed they did so now. Just over one-third (36.4 percent) stated that they knew what being a collaborative agent entailed from the beginning. A few (3 or 9.1 percent) felt they still did not understand the role and expectations for the collaborative agent and two (6.1 percent) did not answer the question at all.

The most frequently mentioned source of information about the role of collaborative agents in Discovery was printed materials (39.4 percent). As noted in the quotations below, many believed that written information on the role of the collaborative agent had only recently been provided (presumably in the notebook provided in May 2007 at the 2008-2009 application guidance meeting), while others remembered this information from the beginning of the Initiative.

Other sources of information about their role mentioned by the collaborative agent representatives were advice and guidance from the liaison or coordinator (30.3 percent), information and exchange at collaborative agent meetings held by the Memorial Fund (27.3 percent), and direct conversations with Memorial Fund staff (21.2 percent).

TYPICAL STATEMENTS FROM COLLABORATIVE AGENT REPRESENTATIVES ON HOW & WHEN THEY RECEIVED INFORMATION ON THE COLLABORATIVE AGENT ROLE

Six months ago we saw a Memorial Fund handout on this – was quite surprised. Frankly I don't think we would have agreed if I had seen this same document six years ago.

TYPICAL STATEMENTS FROM COLLABORATIVE AGENT REPRESENTATIVES ON HOW & WHEN THEY RECEIVED INFORMATION ON THE COLLABORATIVE AGENT ROLE
<i>I'd like to know when they adopted the thing they distributed six months ago – was that available six years ago? I think we would have been willing to do it for a year or two but not make an open-ended commitment.</i>
<i>It wasn't until I went to the first collaborative agent meeting that I understood what might be expected.</i>
<i>I know that there was some information written not too long ago and I remember saying "Wow, that is a lot more than in the beginning."</i>
<i>A good deal was presented in writing and I attended meetings. I had a pretty clear understanding from the beginning of what our role was to be. I just assumed that the expectations were tremendous.</i>
<i>It was trial by fire. We had information, some from the website. I went back to the site often and spoke with some of the liaisons.</i>
<i>Workshops should be provided for the new players on the scene. Also recommend a refresher workshop.</i>
<i>About a year ago the Memorial Fund put out the guidelines for the collaborative agent; we only got that guidance about a year ago from the liaison.</i>
<i>I've been part of the collaborative for about three years, so I had a bit of background information. I knew we were the collaborative agent, but I didn't know what that meant. We started working on our job descriptions and we redefined our roles somewhat. That really helped.</i>

C. What was the role of Collaborative Agent, from their perspective?

In the interview, collaborative agents were asked to give their description of that role. Five (15.2 percent) said that it was to act solely as a fiscal agent, while two were unable to provide a specific answer. The other individuals interviewed mentioned a broad range of roles which they believed the collaborative agent was to take:

- In addition to the five that saw their role as fiscal agent only, another 21 included managing financial matters for the collaborative as part of their role, for a total of 78.8 percent of all collaborative agents.

- Next most frequently mentioned (by 10 individuals or 30.3 percent) was the role of the collaborative agent in linking the collaborative with others in the community and bringing others to the collaborative table.
- Collaborative agents nearly as frequently mentioned facilitating collaborative processes as part of their role (27.3 percent).
- Almost one-quarter (24.2 percent) mentioned that participating in planning and in the governing activities of the collaborative were part of work of the collaborative agent.
- One-fifth (21.2 percent) noted that the collaborative agent should be involved in the substantive work of Discovery.
- Just over one-tenth (12.1 percent) said the collaborative agent's role included promoting and providing publicity for Discovery's work.
- A few mentioned the contributions of meeting or office space, staff time, and staff supervision as part of the collaborative agent's role (6.1 percent each).

STATEMENTS FROM COLLABORATIVE AGENT REPRESENTATIVES WITH A BROAD PERSPECTIVE ON THE COLLABORATIVE AGENT ROLE
<i>Should take a leadership role in terms of identifying and bringing potential partners to the table. Set an example for others in providing in-kind support. Help support the collaborative financially.</i>
<i>To share the work that is being done as it grows and continues to grow... To reach out to other organizations and people in the community. Act as a liaison between parents and Discovery.</i>
<i>Provide oversight – fiscal and administrative. Maintain and ensure some consistency. Facilitate communication, bring people together. Provide resources.</i>
<i>It's the key entity to help motivate the community, getting people to the table.</i>
<i>When all is said and done, to help those primarily in leadership roles to be focused on the goals and objectives set forth by the Memorial Fund.</i>
<i>We are supposed to promote [Discovery]. We are the financial partners; initially they needed us for that role. We also do marketing and increase visibility and do</i>

STATEMENTS FROM COLLABORATIVE AGENT REPRESENTATIVES WITH A BROAD PERSPECTIVE ON THE COLLABORATIVE AGENT ROLE
<i>branding.</i>
<i>First, overseeing the financial aspect, being sure our action plan, our mission, and our goals align with the budget. We also have to have our community invested in our work. The other thing is to be a strong leader within the process, to encourage new members, to speak to others about my experiences.</i>
<i>I view it as the external agent or organization that steps back to look at the bigger picture, asks good questions and suggests new ways of looking at things. It's about being a friendly motivator, a system builder to find inter-organizational partnerships.</i>

D. How well suited did Collaborative Agents see themselves for that role?

Almost three-quarters (72.7 percent) of the collaborative agent representatives described the work of Discovery as closely aligned with their organization’s mission and goals. All but one of the others interviewed reported at least some overlap with Discovery’s work.

In addition to this overall alignment, almost nine out of ten (87.9 percent) collaborative agents reported that there was at least one specific way in which their organization was well suited for that role. Most often mentioned was the strength and extent of their relationships with other organizations in the community (45.5 percent). Other attributes that made them well suited to be collaborative agents were organizational or staff capacities (36.4 percent), experience in working with other groups in similar roles (27.3 percent), fiscal management experience (24.2 percent), and relationships with parents and parent groups (18.2 percent).

TYPICAL STATEMENTS FROM COLLABORATIVE AGENT REPRESENTATIVES ABOUT WHAT MAKES THEIR ORGANIZATION WELL SUITED TO BE THE COLLABORATIVE AGENT
<i>We are a natural table where people come to talk about common issues...an impartial party.</i>
<i>Because of our connections throughout the community. Our history and our reputation.</i>
<i>Because we are neutral, established, have had an impact in the community. We have touched so many areas over the years. We're also impartial. We've</i>

TYPICAL STATEMENTS FROM COLLABORATIVE AGENT REPRESENTATIVES ABOUT WHAT MAKES THEIR ORGANIZATION WELL SUITED TO BE THE COLLABORATIVE AGENT
<i>garnered a lot of respect from the community for that.</i>
<i>We have strong relationships in the community and I can help make connections with town government, with the board of education, and with faith-based groups. Our board has a variety of community members. And we have fiscal stability and a strong reputation.</i>
<i>We are connected to a lot of different components in the community, have strong working relationships with town government, are financially strong and have a good accounting system.</i>
<i>We are well-known in the community, have a knowledge base in early childhood, have grant writing and community organizing skills.</i>

At the same time, many collaborative agents (57.6 percent) believed that their capacity to perform well was limited. Over one-third (36.4 percent) cited limited staff as a factor hindering their ability to carry out their work as well as they would like. Just over one-fifth (21.2 percent) mentioned other factors or the fact that the time required was more than they had expected.

E. In what ways did Collaborative Agents participate in the work of Discovery in communities?

Collaborative membership and participation in decision-making

A large majority (84.8 percent) of the collaborative agents were members of the Discovery collaborative that they served and of these, most (85.7 percent) regularly attended collaborative meetings. More than three-quarters (78.8 percent) of collaborative agents reported being involved in decision-making for the collaborative, as regular members of the collaborative group (36.4 percent), as members of an executive or steering committee (24.2 percent), or in some other oversight role beyond collaborative membership⁴ (18.2 percent). However, most (60.6 percent) did not report participating in the day-to-day activities of the collaborative, leaving that to the staff.

Additional resources provided to collaborative

⁴ For example, “we sit at the table and bring thoughts and suggestions..as everyone else does, but we also play a leadership role in handling the budgetary constraints,” “[my role is] to be at the table and help drive the budget against what is decided by the group,” “the coordinator and I meet and talk once a week...when she makes contractual decisions, she...runs it by me and we brainstorm,” “we carry a certain amount of weight...officers refer to us regularly.”

Just under 70 percent (69.7 percent) of the collaborative agents provided some additional resources to the Discovery collaborative, other than serving as fiscal agent. About one-quarter (8 or 24.2 percent) provided some additional funding or grants to support Discovery work and one more (9 or 27.3 percent) provided office or meeting space. One fewer (7 or 21.2 percent) contributed staff time. More than one-third (13 or 37.5 percent) provided other in-kind support.

F. How did Collaborative Agents see themselves as contributing to the work of Discovery?

Almost all (87.9 percent) of the collaborative agent representatives interviewed described at least one way in which their organization had contributed to the work of Discovery in their community. Providing resources of all kinds (funding, staff, space, and other in-kind) and contributing knowledge and expertise were both mentioned by over two-fifths of the collaboratives (42.4 percent each). Closely following in frequency was the collaborative agent’s contribution in bringing people to the table (39.4 percent). One-third of those interviewed cited the contribution of fiscal management, while almost as many (27.3 percent) reported that the collaborative agent’s dedication to the goals of the Discovery work was itself a contribution. Almost one in five (18.2 percent) believed that the affiliation of Discovery with the collaborative agent organization added to the respect that work received in the community.

<i>TYPICAL STATEMENTS FROM COLLABORATIVE AGENT REPRESENTATIVES ABOUT THEIR CONTRIBUTIONS TO THE WORK OF DISCOVERY</i>
<i>We contribute that we are really good organizers and we are good at bringing large groups to the table... We have a lot of contacts throughout the area.</i>
<i>We bring credibility to the initiative, based on the work we’re already doing in the community.</i>
<i>We had relationships with the key players and that has helped</i>
<i>We were able to bring Discovery into the forefront of the community.</i>
<i>We’ve been able to bring to the table all the learnings and assets of a national campaign.</i>

G. How did Collaborative Agents see their organization as benefiting from working with Discovery?

Just as many collaborative agent representatives who reported that their organization had contributed to Discovery's work described benefits received by their organization from that partnership (87.9 percent). Most frequently, becoming involved with the Discovery collaborative expanded and strengthened relationships between the collaborative agent and other groups in the community (45.5 percent). Working with Discovery was also reported to increase staff knowledge and organizational expertise in the area of early childhood education (39.4 percent), increase the collaborative agent's visibility and credibility in the community (33.3 percent), and provided it opportunities to work on issues central to its interests and mission (33.3 percent). Almost one-quarter (24.2 percent) mentioned enhanced access to resources primarily through joint grant proposals and fund development as a way in which the collaborative agent organization benefited from its role.

TYPICAL STATEMENTS FROM COLLABORATIVE AGENT REPRESENTATIVES ABOUT HOW THEIR ORGANIZATION BENEFITED FROM BEING THE COLLABORATIVE AGENT
<i>Sitting around the table and gaining the knowledge.</i>
<i>Absolutely there have been many benefits. Funding has helped us move forward in grant process. Discovery and the Memorial Fund are so well respected in Connecticut that it helps us get other grants.</i>
<i>We didn't have the visibility we needed and this fit perfectly. Now we are involved with all the agencies in town. Doing this allows us the opportunity to know what is happening in town and be more visible in the community.</i>
<i>Helped us further our own goals. Gave us the opportunity to get with families and individuals on a personal basis.</i>
<i>Image in the community – more people are now aware of the work we do. It allows us to enhance our story – we're not only a funding source but also a convener and collaborator.</i>
<i>The networking is valuable, to gain information and resources</i>
<i>The benefits far outweigh the debits. One is learning – this is different from just being a recipient of funds. It furthers our mission.</i>
<i>It's brought respect from the field, some educational opportunities, community awareness of the needs of our children and families. We also have the</i>

TYPICAL STATEMENTS FROM COLLABORATIVE AGENT REPRESENTATIVES ABOUT HOW THEIR ORGANIZATION BENEFITED FROM BEING THE COLLABORATIVE AGENT

camaraderie of us all working toward the same goals.

The primary drawback to being a Discovery collaborative agent was the time it required, mentioned by 57.6 percent of those interviewed.

H. Overall, how did Collaborative Agents assess the Collaborative Agent strategy?

Success in their community

About half of the collaborative agent representatives reported some way in which they could see their work or their relationship with the Discovery collaborative improved. About equal numbers (between 3 and 5 individuals) mentioned being able to give more time to the work, have clearer expectations about their role, strengthening the collaborative’s governance structure or operations, and some other possible improvements. At the same time, almost three-quarters (72.8 percent) knew of no plans to change collaborative agents or make other substantial changes in their work as collaborative agents.

Considering how it worked in their own community, most collaborative agents who commented on the success of their work said that it had worked well (76.9 percent).

Assessment of the strategy

As a strategy to provide greater stability and institutional capacity for the Discovery work, two-thirds of those who gave an opinion believed that it was a good idea (67.9 percent).

TYPICAL STATEMENTS FROM COLLABORATIVE AGENT REPRESENTATIVES ON THE VALUE OF THE COLLABORATIVE AGENT STRATEGY

To find a strong collaborative agent that is going to be there over a period of time is very important... This is a worthwhile venture.

It has to be a collaborative agent. To turn the money over to an outside organization makes no sense because the whole grant is based on a collaborative process. To have the collaborative agent be only a fiscal agent would not work.

When they pull out, we won't let this sink – it's what I would do in their position.

TYPICAL STATEMENTS FROM COLLABORATIVE AGENT REPRESENTATIVES ON THE VALUE OF THE COLLABORATIVE AGENT STRATEGY
<i>When they finish (which they must, eventually) we will have too much sense of ownership [to let it go away.]</i>
<i>On a scale from 1 to 10, with 10 the best it could be, I would say a 9. The usual thing is to focus on fiscal. By changing that, it gives an organization like ours, which has more than financial expertise, the chance to be a more active member at the table.</i>
<i>I think it's a great idea to get the biggest bang for your buck. If you partner with a complementary organization, you double the resources and what you can accomplish.</i>
<i>This was not something we thought of all along. We thought of the [collaborative agent organization] as being the money people. It was interesting to watch the [collaborative agent organization] take on a leadership role. It was surprising and smart.</i>

I. How did Discovery collaborative staff describe the role of Collaborative Agent?

Coordinators for the Discovery collaborative groups were also asked what they and their group understood to be the role of the collaborative agent. Their answers were a combination of what they would like it to be, especially where that was lacking, and what they found to be valuable in what their agent actually did for the collaboration.

All but 3 coordinators described specific ways in which they expected or had experienced contributions by their collaborative agent to the Discovery work in their community. The number of specific types of contributions ranged from 1 to 9, with most coordinators (73.4 percent) mentioning between 2 and 5 types.

The most frequently mentioned single role was, not surprisingly, that of handling fiscal matters. Almost 60 percent (57.8) of the coordinators reported that this was an expected or actual activity of the collaborative agent.

There were three other categories of collaborative agent responsibilities that were also frequently mentioned by Discovery coordinators as important to that role. These included having knowledge and expertise in the area of early childhood (63.4 percent noted this); providing the collaborative group with one or more kinds of support (61.1 percent of coordinators noted this); and participating in the Discovery collaborative body and its work (noted by 57.8 percent of coordinators).

Discovery coordinators noted that the collaborative agents should or did have the following general skills and capacities:

- Were recognized as a leader in the community (35.6 percent of coordinators mentioned this)
- Had knowledge and expertise in the area of early childhood (26.7 percent)
- Shared a similar mission as Discovery (26.7 percent)
- Have a “big picture” perspective on the work (13.3 percent)

The kinds of supports that Discovery coordinators expected or had received from their collaborative agents included:

- In-kind contributions, such as meeting or office space, supplies, staff support, etc. (31.1 percent of coordinators mentioned this support)
- Assistance in fundraising, including support for grant writing (26.7 percent)
- Technical assistance (15.6 percent)
- Cash contributions (6.7 percent)

Coordinators also expected that the collaborative agents would actively participate in the work of the Discovery group:

- Participate as a member at the Discovery table (mentioned by 51.1 percent of coordinators)
- Participate in decision-making, beyond being a member (15.6 percent)
- Partner on Discovery activities (11.1 percent)

In addition, more than one-quarter (26.7 percent) of coordinators believed that connecting their local collaborative group with other communities or with work at the state level was an important contribution of their collaborative agent.

K. What were the concerns of Discovery coordinators about the performance of their Collaborative Agents?

Most Discovery coordinators (64.4 percent) reported no problems or concerns with the performance of their collaborative agent. Only 1 coordinator mentioned three areas of concern, while 7 had one concern and 8 had two.

The most frequently mentioned concern (by 20 percent of the coordinators) was that the collaborative agent was only interested in fiscal matters. More than one in ten coordinators (11.1 percent) were dissatisfied with the administrative fees charged by their collaborate agent, while nearly as many (8.9 percent) believed that their collaborative agent did not spend enough time on Discovery. A few coordinators believed that the leadership of the collaborative agent organization was not supportive of Discovery (6.7 percent), that the organization's staffing and other capacities were too limited to be really effective (6.7 percent), that the organization was not really part of the community (2.2 percent), or that the collaborative agent was not active in Discovery's work (2.2 percent).