

Editorial

## Building trust for shared services: a model for collaboration between nonprofit reproductive health organizations

A challenging economy, uncertain political support and evolving health technologies call for innovation, collaboration and fresh thinking for all members of the reproductive health community. Clinical practices in the United States are responding to these challenges by testing and implementing shared support services and information systems, driven by the economic downturn, emergence of electronic medical records, and impending health care laws [1].

Reproductive health nongovernmental organizations (NGOs) support the field through research, guidelines development, education and advocacy. Models for shared NGO services are not as plentiful as they are for clinical service providers. New operational models — including novel partnerships for sharing administrative and other functional services — are promising pathways toward ensuring longer-term sustainability for these organizations. Reproductive health nonprofits face the challenge of meeting their particular mission in service to the field by stretching resources to cover basic and programmatic costs [2].

In 2010, the William and Flora Hewlett Foundation awarded an organizational effectiveness grant for a pilot project involving the Association of Reproductive Health Professionals (ARHP), the National Family Planning & Reproductive Health Association (NFPRHA), and Physicians for Reproductive Choice and Health (PRCH). PRCH served as the collaboration's fiscal agent and coordinated the process.

The project's primary objectives were to identify a model or models for sharing of administrative services to reduce costs and/or increase capacity, to explore ways to reduce administrative overhead so that resources can be better devoted to programs to the greatest extent possible, and to create a pilot project that could serve as a model for other organizations that may be considering similar partnerships.

Intended outcomes for the project included the following:

1. Conduct a field analysis of for-profit and not-for-profit organizations that have developed management service models for multiple groups.
2. Prioritize potential areas of shared administrative services and identify the feasibility of combining efforts in these areas.

3. Identify a set of mutually agreed-upon criteria for decision making.

4. Develop a model for sharing administrative services.

Data to inform this project and development of a possible model for sharing administrative services were collected through interviews with three different types of service providers: fiscal sponsors; incorporated collaborative entities; and consultancies/outsourcers that provide back-office services to nonprofit organizations. This was supplemented by input from selected users of these services and review of similar studies.

Based on review of the data, evaluation of the pros and cons of the three options, and consideration of actual needs of the three participating organizations, it was agreed that a consultancy/outourcing arrangement was the most viable option. The group then identified potential services that could be outsourced and developed criteria for evaluating and prioritizing which to pursue. This exercise, informed by the data collected, resulted in two key decisions that refined and clarified the project objectives. The first was agreement that the model to be developed would take the form of a Request for Proposals (RFPs) for shared services. The second was to develop two models/RFPs — one addressing an administrative priority and one addressing a programmatic priority, even though the original focus had been only on potential areas of shared administrative services. There was also agreement that reducing costs should not be the primary criterion or driver, since the data documented that cost savings are not the major benefit of these efforts.

It was agreed that the models/RFPs would be created by the chief executive officers (CEOs) of each organization (ARHP, NFPRHA and PRCH) with input and involvement of appropriate staff from the three organizations, which required slowing down and opening up the process to ensure the understanding, buy-in and commitment of key staff.

The final written products are two model RFPs for (1) outsourced full-service website and IT-related services and (2) communications services. What was clear to the three participating CEOs was that moving forward with issuing these models would require a significant commitment of time

and other resources and should not be undertaken unless funding is secured to make this an organizational priority that does not have to compete for attention with other funded priorities.

Even more important than the written products, however, was the trust and positive, productive working relationships built among the three participating CEOs, which lays a solid foundation for any future collaborative efforts involving these three organizations. In working closely together over the year, we created a sense of community and support that will be helpful in future movement work and collaborations.

### Key lessons learned

The three organizations learned a number of key lessons during the course of this project and make the following recommendations to others for planning or executing a similar project:

- Direct, hands-on participation of top leadership is critical.
- Building trust and establishing good working relationships among the three CEOs was an essential ingredient of the success of this project. In-person, face-to-face meetings were an important part of trust building and provided a solid foundation upon which to build and work collaboratively, whether on the two RFP projects or other future issues.
- The three CEOs needed to commit a significant amount of time and energy to build the trust and confidence needed to surface, explore and understand each other's perspectives, concerns and sensitive issues. This created a context that made it easier to reach shared agreement around priorities.
- Having a CEO member who had prior experience with cross-organizational collaborations and strategic alliances informed our experience and helped us understand and avoid potential pitfalls and detours. Without that experience in the discussions, our process would have taken longer.
- The purpose and objectives of the project need to be important and compelling to all organizations and parties involved because success depends on investing significant time in planning and thinking together as well as intentionality.
- Because other staff members were not initially involved in the process, it required additional time when they were added to get them engaged and invested in the project, build relationships among them and get everyone on the same page. The groundwork for this might have been laid earlier by keeping them more informed about this project, its objectives, its relevance to their jobs and the organization, and their potential

roles in it. Good communication that keeps all relevant staff informed is important.

- A larger team can add value, but it also requires more time and puts more demands on staff and organizational resources — and it could detract from other organizational priorities.
- Involving staff across functions and levels of participating organizations requires building trust among them as well as clarifying roles, responsibilities, authority and accountabilities. It takes time to build relationships and think about the issues — we would estimate at least 3 to 6 months to lay the groundwork for an ongoing collaboration.
- In small nonprofit organizations with limited, overworked staff, there is not much latitude to take on unfunded, unplanned, unbudgeted projects that will put even more demands on staff. Because this project primarily involved only the three CEOs, demands on other staff were limited, but all three organizations had already made a significant upfront investment of time. If other staff members are to be involved in moving this forward, their time commitment and other necessary resources need to be planned, budgeted and funded.
- Funding ensures that time and resources are available to do the work and see the project through; without dedicated funding, other funded priorities will take precedence.
- The assumption going into this project was that geography does not matter because of current technology. But technology proved to be inferior to in-person meetings in many respects and, depending on the project selected, it might create an obstacle that needs to be considered, at least until solid relationships and trust are established. In addition, being closer in proximity would make getting together for in-person meetings less expensive and easier overall.
- Working in a collaborative environment is a much different experience than reading about it.
- Establishing and observing guidelines for working together and decision making were very helpful and provided building blocks for establishing trust and creating an effective process. Especially important was respecting the agreement that any one member of the group had veto power and everyone should be able to live with decisions made and have no significant objections — willingness to go along matters.
- Good process is essential for building the trust and relationships that are the foundation of an effective and successful collaboration. Our process was open and transparent; participants respected each other, listened to each other and said what they felt was important.

The bottom line is that NGO collaborations for efficiency and mutual gain are essential and the potential is broad, but that key assumptions about outcomes should be

discarded. Shared services do not automatically translate into cost savings: they depend on finding common ground among different organizational cultures and require general operating support to become realized. We look forward to working with each other and with different organizations to further refine an effective model for shared NGO services.

Clare Coleman

*National Family Planning & Reproductive Health  
Association, Washington, DC 20006, USA*

Jodi Magee

*Physicians for Reproductive Choice and Health  
New York, NY 10018, USA*

Wayne Shields

*Association of Reproductive Health Professionals*

*Washington, DC 20036, USA*

*E-mail address: [wshields@arhp.org](mailto:wshields@arhp.org)*

## References

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