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*Building the Alliance: Strategies For
Creating, Leading and Coaching
Collaborative Ventures*

By Gary Quehl, Ed.D. Interviewed By: William Bergquist, Ph.D.

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Building the Alliance: Strategies For Creating, Leading and Coaching Collaborative Ventures

BY GARY QUEHL, ED.D

INTERVIEWED BY WILLIAM BERGQUIST, PH.D.

Following is an interview conducted by William Bergquist, Co-Executive Editor of IJC,O with Gary Quehl, a leader, coach and consultant, who has accumulated many years of experience and expertise in working with organizational leaders who are seeking to collaborate with one another. Quehl shares lessons learned about collaboration and about the roles that coaches can play in helping leaders successfully strategize about various complex and often unpredictable modes of cooperation.

Bill: Gary, thanks for joining me in this interview about alliance-building. We've known one another for many years, but I don't believe we have ever discussed this topic in depth before now. To begin, do you have any initial thoughts about the nature of alliance-building?

Gary: Sure. Whether called alliance-building, collaboration, or partnering, the motivation for most forms of cooperation among organizations derives from mutual self interests. Idealistic platitudes aside, alliances are best undertaken and sustained when agreement is reached between organizations on two key factors: identifying what can be achieved together that cannot be done, or done as well, alone; and establishing how the object of collaboration can best be organized and accomplished. This is at the heart of initiating and maintaining organizational alliances, and everything else flows from here.

Further, when I think about alliance-building my mind immediately goes to a specific kind of organizational cooperation—voluntary collaboration. This excludes most governmental organizations because legislative and administrative mandates dictate the nature of organizational relations. It also excludes certain types of relations among business organizations—hostile take-overs or mergers, for example—because these typically involve a high degree of coercion.

Since all of my professional experiences have been with colleges, universities, and other kinds of public benefit organizations, it is to these kinds of associations that I turn when considering the nature of voluntary alliance-building.

Bill: You're now living in the Sierra Nevada foothill communities of Nevada City and Grass Valley, California. I understand you have been donating much of your free time to alliance-building among the county's numerous nonprofit organizations over the past five years. What's this all about, and what are you learning?

Gary: Well, Nevada County, California, has what is believed to be the most significant ratio of nonprofit organizations to population anywhere in US: 350 nonprofits for a rural county of 93,000 people! After moving here, I learned a number of things: With the exception of four of these organizations, most were weak and struggling for survival—and few were engaged in following “best practices.” Also, the organizations

tended to be highly guarded about their internal affairs, and the executives and board officers of these agencies had little desire for cross communication. And perhaps most limiting of all, these leaders believed their organizations aggressively had to compete against one another because human and financial resources within the community were considered scarce and fixed. This generated a corrosive and stultifying attitude of “If you get yours, we won’t get ours.” As it turns out, none of this was true. The per capita wealth in Nevada County is one of the highest in California, and the bench strength of talented men and women who continue to move up here and seek service as volunteers and members of non-profit organizations is in my experience unmatched.

Bill: *So, what did you do? Was there anything to build on?*

Gary: Yes there was. Fortunately, I had known the CEO of one of our most prominent nonprofit organizations before moving here. And she had provided leadership in creating a small cooperative fund raising program in estate planning called Leave A Legacy. While only the strongest of our nonprofits tended to take advantage of this program, it was a benchmark that we could point to as a precedent for alliance-building.

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So my colleague and I conspired to prepare the ground for further collaboration. Through a series of meetings, we invited our nonprofit CEOs to identify the kinds of assistance they most needed, including whether they were willing to participate in a low key alliance that would provide these services. Within six months, fourteen of the CEOs joined together in collaborating on a white paper that identified a series of workshops for nonprofit board members and the vehicle for delivering them: The Center for Nonprofit Leadership, CNL for short

Bill: *Describe, if you would, how the organization of CNL has guided alliance-building among its member nonprofit organizations.*

Gary: The initial proposal was for CNL to become yet another 501 (c) (3) nonprofit organization in the county. Wanting to avoid even the hint of duplication of effort, or pose a threat to our non-profit organizations, I was able to successfully argue for an alternative model: creating a voluntary group of nonprofit executive directors, board members, and community members like me (15 in all) who would constitute a CNL Steering Committee. And without staff or expenses other than the minor cost of delivering workshops and seminars. The Steering Committee was created, and sub-committees were formed—the most critical being the Curriculum Committee that has designed and delivered highly successful board development workshops on a variety of needed topics (e.g., fund raising, strategic planning).

Bill: *So, one of the secrets in building this alliance has been to ensure a low-threat level for participating organizations. And if I understand you, CNL has been entirely volunteer-led and driven. Does that mean CNL is only as good as its last workshop, and that it will continue to exist only as long as its leaders volunteer their time and talent?*

Gary: Yes on both counts. The deliberate decision not to seek 501 (c) (3) status means that rather than having a self-perpetuating board we have a group of individuals who will continue providing their services only so long as these services are desired and actually used by our non-profit agencies. And so long as these workshop leaders continue to get personal satisfaction from doing this. The mem-

ber organization EDs [executive directors] and board chairs know that, and every time one of us gets up to make a workshop presentation, participants understand we are doing this for their betterment rather than for personal gain.

Bill: *Are there additional lessons to be learned about the success of the CNL alliance thus far?*

Gary: I can't emphasize enough the importance of there being parity of esteem among organizations who wish to enter into an alliance. Shared values, similar reputation, more or less equal resources—all of these are critical to getting an effort underway. In the case of CNL, it was the “thousand pound gorillas”—our four major nonprofit organizations—who had learned enough about the benefits of collaboration from Leave A Legacy to provide leadership for the creation of CNL. Once they signed on, most other nonprofit organizations followed suit.

Another lesson in establishing our highly successful alliance concerns finance. A deliberate decision was made to charge only token annual dues for CNL membership, and workshop fees have been capped at \$25 for half days and \$50 for full days. Normally, fees for the high quality workshops that CNL hosts would be in the \$350-\$400 per day range. Charging low fees for high quality programming makes it possible for even the most modestly-funded nonprofit to participate. It also sends a signal that CNL is about service leadership, and this has had the powerful effect of helping to remove artificial barriers that once stood between our nonprofit organizations. In fact, something of a “tipping point” has been reached.

It also sends a signal that CNL is about service leadership, and this has had the powerful effect of helping to remove artificial barriers that once stood between our nonprofit organizations.

Bill: *What do you mean by “tipping point”? Say more.*

Gary: I simply mean that the approach we have taken to nonprofit alliance-building through CNL has created an entirely new atmosphere for collaboration and future-building among our organizations. What started as workshop services for our nonprofits has become an important step in significant community-building. For example, our arts organization are now sponsoring cooperative projects that go beyond what any one of them could accomplish, including

the possibility of a major new multi-purpose performing and visual arts venue. Nonprofit chief financial officers are meeting informally to problem-solve and share ideas, and member organizations are demanding an expansion of CNL services. This has resulted in the appointment of a part-time administrator—entirely paid for out of modest income from CNL workshop fees. There is also some talk about the possibility of CNL fostering the creation of a Community Foundation to fund worthy collaborative projects and to help entice nonprofit organizations out of their self-isolating silos. And a new forum of CNL leaders and community leaders is in the process of identifying major community needs that are not currently being addressed by nonprofit organizations. This visioning group is also assessing what our nonprofit organizations require from the community to achieve greater results.

It is also increasingly clear that some kind of “tipping point” is being reached within CNL itself. With increasing membership demands being placed on CNL, it is uncertain whether the organization can remain an entirely informal, volunteer-led Steering Committee. Or that a part-time staff member will be enough for the ambitious agenda that is beginning to unfold. Serious talk about CNL becoming a

501 (c) (3) organization that can seek funds and staff for expanded programs and services is coming from the very nonprofit organizations that would have fought such an idea at the outset. So, CNL and its collaborating nonprofit organizations are passing through some kind of developmental stage that is both exciting and problematic at to what next steps should be.

Bill: *I sense that you've played an important coaching role throughout this process. What has this involved?*

Gary: Well, it certainly hasn't been the kind of executive coaching I have done in my national consulting practice, Quehl Associates. The whole business of negotiating the nature of my relationship with a client and then proceeding to use best practices for executive or organizational coaching simply wouldn't have worked in building the CNL alliance. It's because I have been both an active participant and over-all organizational coach that the strategies and procedures have had to differ.

This means I have used a number of leadership styles to match the various coaching roles I have had to play along the way. Drawing from the literature on leadership, I suppose this initially involved some form of charismatic leadership because I was recognized as an outside spokesperson on public benefit organizations. That helped to inspire the level of trust and confidence that was needed to get the original group of nonprofit EDs to the table, reach agreement on a mission, and launch CNL as a distinctive kind of organization.

As CNL Steering Committee chair during the first two years my coaching began to involved legitimate leadership, and my various workshop designs and presentations called on me to provide expert leadership as well. Reward leadership was also in play because organizational success depended on my being able to provide recognition and reinforcement to work well done. Coercive leadership was sometimes used when the occasional need arose to herd highly creative Steering Committee members in achieving agreed-upon goals. But this was very rare.

Through it all, however, my guide has been the servant leader concept—a style dependent on deeply held values and spiritual forces that bind me and those within CNL with whom I work and play. In any event, the substance and style of my coaching was not about me. This was tested about a year ago when I informed Steering Committee members I would be pleased to continue serving on the Steering and Curriculum committees, and to lead the occasional workshop, but I would no longer be chair of either committee. For a time this decision created confusion and even some anger: I was thought to be abandoning them and letting them down. However, a new chair took hold and has led CNL to a new threshold of possibilities. This has given me the freedom to explore ways in which these possibilities might be shaped and realized. It is where I belong, where whatever talents I have can best be used. I deeply love being in this time and place.

Bill: *Well, you haven't always been in this place. I know that earlier in your career you taught philosophy to undergraduates, served as an academic vice president, headed a consortium of private colleges and universities in New York State, been president of two national service associations of colleges and universities in Washington, DC, and for the past fifteen years have had your own consulting firm. Let's reflect on some of your leadership experience over the past 40 years in terms of your coaching and being coached. To begin, what observations do you have about the roles of formal and informal leadership as related to coaching?*

I want to challenge the enchanted notion that the formal, authoritative leader is able to be an effective coach to his or her own organization.

Gary: I want to challenge the enchanted notion that the formal, authoritative leader is able to be an effective coach to his or her own organization. My 20 years experience as a CEO of three organizations suggests that this just can't happen, that the external coach or the third party coach are the only way to go. The reasons? The role of formal leader in most organizations is simply too complex and time-consuming. Moreover, the chief executive or department head isn't able to achieve the kind of detachment, or the level of reflection about his or her own behavior, that is required for good coaching to occur. And if it is the subordinate we're talking about, this person needs to have the safety of an outside coach rather than risking coaching from the executive. It is awfully hard to ask the subordinate to be open and reflective in the face of formal authority.

In short, I believe the idea of the formal-leader-as-coach may sound attractive in theory, but anyone who has served in the chief executive position will know this proposition is utopian. And therefore misleading and even dangerous.

Bill: *OK, but what are your reflections about being coached? If you think back to the three organizations you headed, what type of coaching would you like to have had if there was such a thing in those days? And particularly, what type of coaching would have helped you be more effective in building alliances that were associated with the organizations you led?*

Gary: There wasn't such a thing as executive coaching as we now know it. End-of-year performance assessments and periodic up-or-down summary evaluations by my governing boards were standard stuff. And I did the same with the staff who reported to me. But beyond that, CEOs like me were pretty much left to the leadership and management literature and to informal exchanges with colleague CEOs as the primary learning resources.

What most often saved me from myself was my willingness to go out and ask for help when I thought my organization or I needed it. I never felt that I had to show myself as being smarter or better than others because I knew that wasn't true. So I went out and got expertise when I wanted it. And that included wonderful coaches and professionals like you.

Bill: *How was that expertise different from what you would have asked for if you'd been head of a business corporation or president of a college or university?*

Gary: The expertise that I sought was needed to support big visions and dreams, and only rarely was it technically focused or detail-oriented. Perhaps this says more about the kind of nonprofit organizations that I headed than anything else. In all three cases, my organizations demanded that I take risks and try-out new ideas. For example, at the College Center of the Finger Lakes that I headed in New York State, we successfully undertook a consortium-wide strategic plan of member colleges—the first of its kind in the country. And at the Council of Independent Colleges, we used a small existing organization to lay the ground work for what has become the premier national service organization for private colleges and universities.

In every case this required a kind of organizational flexibility I could never have found in a college or university presidency, much less a business corporation. The hierarchical nature of those kinds of organizations, with their numerous levels

and departments, is something I would have found stultifying and distasteful. Nor would I have brought much talent to leading them either. I would have quickly despaired of being too confined, of having to be too much of a manager and caretaker rather than a leader. This doesn't mean that colleges and universities can't or don't respond to effective presidential leadership; it's that my leadership style would not have flourished in this kind of environment.

Bill: *So to return to my earlier question, could you have benefited from today's kind of executive coaching had it been available?*

Gary: Oh my yes. The third organization that I headed for four years before opening my consulting firm in 1990 is an excellent case in point. Indeed, the organization is called CASE, the Council for Advancement and Support of Education. It is one of 20 or 30 of the Washington, DC, higher education associations, based at One Dupont Circle and environs.

Bill: *I well remember that time in your professional life, and all of the political intrigue of these associations and their 4,000 member colleges and universities. If I recall correctly, you found that setting and organization to be something of a zoo. How might a coach have helped you in what became an untenable situation?*

Gary: I am tempted to say that the dynamics of CASE having a national/ international governing board and seven regional governing boards prevented effective executive leadership from occurring. And certainly the organization's history of petty pitched battles among fund raising, alumni affairs, and public relations professionals prevented CASE from being able to embrace large ideas.

But this would only be part of the story. I was hired at CASE partly because I had successfully led the Council of Independent Colleges for 12 years and was an experienced hand in Washington, DC. And partly because I had organized and led the first national public relations campaign ever undertaken for private higher education. What with the prevailing atmosphere of the Reagan White House and Education Secretary William Bennett brow-beating college and university presidents, the CASE board apparently thought I was the best person for the job. After being hired, I personally undertook a year long study of issues facing American higher education (*Higher Education in the Nation's Service: A Report to the Campus*). This report resulted in the creation of a huge, multi-faceted CASE-led public education campaign that was to involve all of the national higher education associations, the nation's 4,000 plus colleges and universities, the Advertising Council, key foundations, and major business leaders.

The planning of this enormous effort got only so far and then stalled due to the reluctance of some key associations leaders to have their organizations fully participate. But it also failed because I had lost my own way as a person, as a leader, and especially as an alliance-builder. Rather than confer with other organizations each step of the way, I felt I knew how best to proceed. It was that old Washington, DC, disease, hubris, and my behavior was a key factor in preventing the grandiose plan from being fully implemented.

Unfortunately my friends, a senior consultant, and other association CEOs chose not to confront me. And I chose not to notice. Had I had the kind of executive coaches that we have today, I might have been more aware of my motivations and proposals before acting on them. And American higher education might be in a bit better place than it is today.

Bill: *You've had a highly successful consulting practice for the past 15 years. What insights do you have to share about the relationship of consulting and coaching, and particularly the importance of an appreciative perspective?*

Gary: Initially I worked with colleges, universities, foundations, and other kinds of public benefit organizations in a traditional consulting format: problem-solving. My consulting focused on helping organizations with strategic planning, board development, fund raising, executive search, and academic program review. In every case, my client relationship would proceed from the assumption that something was wrong, or broken, and my job was to help fix it.

Eventually, as I learned about Appreciative Inquiry (an awful name for a wonderful theory), I began to think differently about the nature of my relationship with clients and, then, about the work itself. My way into discovering an appreciative perspective was through my strategic planning work. If ever there was a problem-based construct, it is traditional SWOT analysis and the need to resolve strategic issues. At the end of each client's strategic planning process I found that although things were better on paper, the perspective and energy simply weren't there. And I felt my clients were always happy to see me go. While we followed the classic strategic planning play book together, the process turned out to be dreadful—adding to the negative imagery of what were already problem-plagued organizations.

It began to occur to me that proceeding from the perspective of positive imagery could be even more powerful than always searching for and inevitably finding problems. So I began to change my approach to strategic planning by placing initial emphasis on having organization members identify significant organizational achievements and the tasks, processes, and attitudes that had made them possible. Once there was solid understanding and affirmation of this base of achievement, it became possible for each client to define what was missing and what they concluded had to be done to address it. This resulted in very different attitudes and momentum. By the end of each strategic planning process my client had enormous enthusiasm about what they had produced, and an eagerness to build on this success in implementing imaginatively-crafted key strategic directions. Voila, what a difference!

Along the way of my 15 years of consulting I discovered, then, that I was a coach, not a consultant. And that I preferred being a coach. In a very real sense, I had come full circle back to my early days as a young man at the College Center of the Finger Lakes. In that capacity, everything was done by consensus, and my role was to gently engage the leaders of member colleges and universities and nudge them along inch-by-inch, never going beyond the edge of what they found tolerable in building the alliance. I had been a coach back then, but I lost my perspective along the way as I took on leading bigger and more complex organizations.

In discovering an appreciative perspective, I was able to become a coach again, which is how I see myself today—and pretty much how I have proceeded in my pro bono work with the Center for Nonprofit Leadership. As I said earlier, I deeply love being in this time and place as a volunteer coach to my community.

Bill: *Let us conclude with a final question. As you think back about alliance-building in all of the ways you have experienced it during your career, what lessons stand out?*

Gary: Well, we've already talked about some of these: If partner-building is to be successful, it must be voluntary on the part of participating organizations. It must also be based on mutual self interests, on figuring out what can be done together that can't be done, or done as well, alone. To the extent that it is possible, there must be parity of esteem among participating organizations, and the threat to individual sovereignty must be low—at least initially. And behind it all there must be a minimum of coercion—although the lure of, say, financial benefit, often is used as a very compelling enticement for attracting membership to an alliance.

I have also learned that there are at least three stages to successful alliance-building. None automatically leads to the next, and it certainly is easier to understand how an alliance developed into maturity after, rather than before, the process is initiated. Regardless, an alliance usually begins with the stage of romance. Objectives are straight forward and lack complexity, and agreement about how to proceed is readily forthcoming. This first stage enables a participating organization to get its foot in the door without risking much, and challenges to the proposed alliance usually are minor. The stage of romance is indeed a courtship, for it allows participating organizations to conclude that “we can try this, and it's a good thing to do.” But it's very important to recognize that this stage has low expectations and usually yields minor results.

The stage of accommodation is reached when the parties to an alliance begin to realize there are real benefits to collaboration, that the autonomy of their individual organization hasn't been eroded much or at all, and there are compelling reasons to proceed to a more advanced kind of partnership. At this stage organization leaders are willing to go for higher stakes with regard to financial resource commitments, outcome expectations, risk-taking, and general trust in one another. The trust needed at this stage usually requires detailed attention to defining procedures in such a way that institutional autonomy is preserved apart from what needs to be relinquished to achieve new and advanced goals.

Finally, there is a third possible stage—the stage of interdependence. Let me offer an example. (I probably lack all of the details, and some may be incorrect, but the story establishes the point I want to make.) Back in the 1930s, a very senior and influential business leader, Atherton Bean, thought it wise for the business community of Minneapolis to be aggressive about good corporate citizenship. The assumption was that if business helped to create and sustain a better quality of community life, both the community and business would prosper. Bean brought together like-minded business leaders, and each agreed to contribute to charitable purposes something in the range of 3-5% of their pretax corporate profits for the betterment of Minneapolis. Whenever a new business CEO came to town, the Bean business leadership group would take this person to dinner and inform him what the cost of social acceptance would be: a significant level of corporate pre-tax dollars given to public benefit organizations. So, it was a hardball alliance for very wonderful purposes. And it worked. Since that time Minneapolis, like most other major cities, have seen leadership shift from locally-owned corporations to absentee-owned businesses managed from afar. But in the 70 or so years after Atherton Bean and his colleagues invented the Minneapolis Idea, there is little doubt that their leadership and informal alliance resulted in the creation and development of countless local public benefit organizations.

If partner-building is to be successful, it must be voluntary. It must also be based on mutual self interests, on figuring out what can be done together that can't be done, or done as well, alone.

If we had more time to analyze this case, I expect we would be able to draw-out some important principles about leadership, alliance-building, coaching, and the possibility that the stage of interdependence can be realized.

Bill: *Gary, thank you very much for your contribution to our journal. You have offered many insights and terrific advice about leadership, coaching, and alliance-building.*

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