



Collaborative Strategic Management

Amelia Clarke
 PhD Candidate, Strategy and Organization Area
 Desautels Faculty of Management, McGill University
 Montreal, Canada



Dr. Mark Fuller
 Assistant Professor
 Schwartz School of Business, St. Francis Xavier University
 Antigonish, Canada



Research funded by:
 Edith & Norman Strauss Doctoral Fellowship in Professional Ethics in Business
 Center for Strategy Studies in Organizations, McGill University
 Internal SSHRC, McGill University

Overview

Introduction to Collaborative Strategic Management

- Process Model

Introduction to two cases

- Montreal's Collective Sustainable Development Strategy
- Antigonish Sustainable Development

Conclusions

- Process Model of Collaborative Strategic Management
- Contextual Considerations and Replication
- Organizational versus Collaborative Implementation
- Implications of Scale



Introduction to Collaborative Research

Problem:

- Social meta-problems, such as unsustainable development, are too large for any one organization (Trist, 1983)

Solution:

- Inter-organizational collaborative approaches (Cropper, Ebers, Huxham, & Ring, 2008)

Gap:

- Collaborative strategic management
 - Implementation and outcomes



Theoretical Positioning

Inter-Organizational Relations Literature

- Cross-sector social partnerships
 (Selsky and Parker, 2005 – *Journal of Management*)
- Collaborative strategy
 (Huxham & MacDonald, 1992 – *Management Decision*)

Organizational Strategic Management Literature

- Collective strategy
 (Astley and Fombrun, 1983 – *Academy of Management Review*)



Collaborative Strategy

Strategic Management Levels:

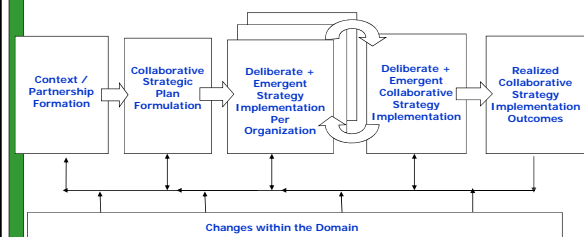
- Functional
- Business
- Corporate
- Collaborative**

Collaborative Strategy is defined as:

the joint determination of the vision, long-term collaborative goals and objectives, and the adoption of courses of action and allocation of resources necessary for carrying out these collaborative goals by the partners; the implementation may be jointly or individually enacted.



Collaborative Strategic Management



Process Models

Phase/ Author	Assessing the Context	Partnership Formation	Strategic Plan Formulation (Organizational or Collaborative)	Organizational Strategy Implementation (Deliberate + Emergent)	Collaborative Strategy Implementation (Deliberate + Emergent)	Realized Collaborative Strategy Implementation Outcomes
Mintzberg & Waters			Intended strategy	Deliberate + Emergent strategies		Realized strategy
Andrews	External + internal analysis		Functional, business, and corporate strategies	Strategy implementation		
Hood, Lopodan, & Thompson	Environmental + organizational factors	Group interaction factors				Outcomes
McCann then Gray	Problem-setting		Direction-setting			Structuring
Seitanidi & Crane		Partnership Selection	Partnership Design	Partnership Institutionalization		
Waddock	Crystallization	Coalition building	Purpose formation			
Waddell & Brown	Identify preconditions for partnerships	Convening partners	Setting shared directions		Implement action strategies	Institutionalize and/or expand partnership

Methodology

Two qualitative case studies

- Montreal Collective Sustainable Development Strategy (12 interviews)
- Antigonish Sustainable Development (15 interviews)

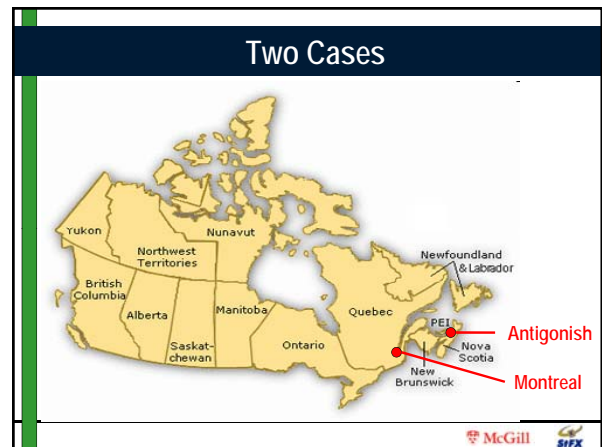
Collaborative Regional Sustainable Development Strategies:

- Bounded by a geographic (local) region
- Numerous cross-sector partners (private, public, and non-profit)
- Generally a deliberate collaborative strategic plan with a distinct formulation and implementation phase
- Integrated content – economic, social and ecological which is broader than the jurisdiction of any one organization

Determining In-Depth Cases

Criteria for determining in-depth cases:

1. The region has multi-organizational cross-sector partnership with a collaborative regional sustainable development strategy (CRSDS)
2. The cases represent the same archetypal structural arrangement (Clarke, 2009) (so we could consider context)
3. One region has a small population size, and the other a larger population size (so we could consider scale)
4. Sufficient information exists and is accessible



Context

Community	Antigonish	Montreal
Population	18,836	1,620,693
Land area	1,457.82 km ²	365.13 km ²
Population density	12.9 persons / km ²	4,438.7 persons / km ²
2001 to 2006 population change	-3.8%	2.3%
Single-detached houses as a % of total occupied private dwellings	71.0%	7.5%
Non-immigrants as a % of the total population	95.3%	67.1%

Antigonish Process

Case Study	Antigonish
Context / Partnership Formation	New organization with governmental, business and non-profit partners on the Board
Collaborative Strategic Plan Formulation	Intra-organizationally driven by Executive Director and Board members, in consultation with community partners (adopted in 2007)
Deliberate and Emergent Collaborative Strategy Implementation	A sectoral approach to strategy implementation: local governments; cohort of 20 small businesses; and home owners
Deliberate and Emergent Strategy Implementation per Organization	Each organization developed and implemented their own action plans that were specific to their sector
Realized Implementation Outcomes	Strategic progress on all fronts; ecological improvements difficult to assess

Montreal Process

Case Study	Montreal
Context / Partnership Formation	A municipal government in partnership with two cross-sector network organizations
Collaborative Strategic Plan Formulation	Inter-organizationally driven by steering and partners committees (adopted in 2005)
Deliberate and Emergent Collaborative Strategy Implementation	Governance adaptation ; An opt-in approach to implementation by partners; Opportunities to network; common reporting
Deliberate and Emergent Strategy Implementation per Organization	Each partner (there were 125 by June 2008) implements the actions they commit to and reports annually on progress
Realized Implementation Outcomes	Strategic progress on all fronts; yet overall ecological improvements in only some areas

Discussion: Process Similarities

Similarities:

- Both regions could be described with the process model for collaborative strategic management
- Implementation is mostly conducted within individual partner organizations
- A collaborative oversight entity oversees the process, the networking, and the ongoing evaluation
- There is a distinct difference between the collaborative implementation and the implementation per organization (thus showing the need for this distinction in the model)
- Corrective action throughout
- Both achieved progress towards their desired outcomes

Discussion: Process Differences

Differences:

- Antigonish created a new organization to oversee the partnership while Montreal created committees
- Montreal used an 'opt-in' approach for partners to choose relevant actions to work on, while Antigonish used a sector-specific approach with partners choosing to engage in the whole process (or not at all)
- Antigonish, as a smaller community, had limitations on available resources (especially expertise)
- Montreal, as a much larger region, had many more partners, and a need for a more extensive governance system

Implications

Findings:

- Process model of collaborative strategic management is applicable for cross-sector social partnerships with a collaborative regional sustainable development strategy – even at different scales, with different contexts, and with different approaches
- Contextual considerations influence type and number of partners; strategic plan content and priorities; resources available, and governance structures
- Strategic adaptation is needed at both the collaborative and partner levels of analysis

Q & A



Thank You...

Questions? Comments?

For a pdf copy of the presentation – email:
Amelia.Clarke@mail.mcgill.ca