

Ecomuseums as cross-sector partnerships: governance, strategy and leadership

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Ecomuseums are attracting increasing attention as means of preserving heritage and also impacting positively on social and economic issues. This paper contrasts ecomuseums with previous forms of cross-sector partnerships. The authors focus on the governance, strategy and leadership of the Flodden 1513 Ecomuseum. The findings have lessons for ecomuseums and other cross-sector partnerships both in and outside the UK.

Keywords: Community; ecomuseum; governance; leadership; partnership; strategy

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There are now over 400 ecomuseums around the world (Borrelli and Davis, 2012) and they are attracting an increasing amount of academic interest (Google Scholar shows just a few papers published in 1990, but over 300 a year from 2010). However, they have received little attention in the management and organization studies literature. Our study was intended to fill this gap by contrasting ecomuseums with 'normal' crosssector partnerships.

The 'eco' prefix derives from the Greek *oikos*: a house, living space or habitat (Davis, 2011). Thus ecomuseums evoke a 'sense of place'. This includes the tangible heritage, such as the objects that are the preserve of traditional museums, but also domestic, agricultural and industrial buildings, and the wildlife and natural landscape. Perhaps more significantly, it also includes the intangible heritage such as memories, folklore, skills, crafts and traditions.

The plural nature of ecomuseums—as community-based organizations, which are primarily concerned with caring for local heritage, while also being a vehicle for social, economic and environmental sustainable development— means that some sort of partnership governance is common (Davis, 2011). This study focuses on the Flodden 1513 Ecomuseum (www.flodden1513.com), which is no exception. Since its inception there have been a mix of business, local government, national park, charity, and community representatives, who have contributed knowledge and expertise as diverse as archaeology, archives, school education and adult lifelong learning, tourism, event management, fundraising, project management, tight cost control and risk management, developing sustainable income sources, and the leadership and management competences to run a complex, community-based partnership. It therefore provides an interesting case study to contrast with cross-sector partnerships.

The community-led nature of the Flodden 1513 Ecomuseum is particularly relevant in the current economic and political climate. Austerity budget cuts have had a significant impact on public service delivery in the UK (Lowndes and Squires, 2012), including the removal of the regional tier of governance (Fenwick, 2015), and a political agenda of community collectivism and localism. This has resulted in a rise in communityled (i.e. not public sector led), cross-sector partnerships. Some of these partnerships have been mandated, for example local enterprise partnerships (LEPs) that are required to be chaired by a local business leader (Pugalis and Townsend, 2013). Others have been enabled by legislation, for example the Localism Act 2011

allowed local communities to produce their own local planning guidance—neighbourhood plans (Gallent and Robinson, 2012).

This paper contrasts ecomuseums with previous forms of cross-sector partnerships. We focus on the governance, strategy and leadership of the Flodden 1513 Ecomuseum and how they differ from previous forms of cross-sector partnership. We also explore whether any theory developed in the ecomuseum context can be generalized to other cross-sector partnership contexts.

Challenges of cross-sector partnerships

A cross-sector partnership involves the public, private and/or third sectors working together to commit resources and capabilities and share decision-making for the mid- to long-term, to address a wicked social problem (Selsky and Parker, 2005; Bryson *et al.*, 2006). Existing literature on cross-sector partnerships indicates that this is a challenging organizational form (Huxham and Vangen, 2005; Bryson *et al.*, 2006). There is a high direct cost to each partner (staff time, financial contribution, sharing assets and/ or information, and the associated risks). Cross-sector partnerships take time to come to fruition and delivery is often frustratingly slow. Most importantly, cross-sector partnerships frequently fail to achieve their goals. The literature on cross-sector partnerships can be summarized in relation to three particular challenges: governance, strategy and leadership.

Governance

The fundamental challenge for governance, both as an opportunity and a threat, is the diversity of partners (Huxham and Vangen, 2005; Vangen and Huxham, 2012) and gaining legitimacy (Page *et al.*, in press). The very attraction to collaborate is to take advantage of this diversity— to leverage disparate capabilities and resources to generate novel solutions and synergy between partners. In response to this spectrum of diversity challenges, a series of dimensions of structural governance has been discussed in the literature. First, is the degree of collaboration from short-term, relatively superficial co-operation, to long-term, interdependent collaboration (Keast *et al.*, 2007). Second, the degree of formality and centralization range from a loose network to a strong partnership with its own legal entity, administration, organization and staff (Bryson *et al.*, 2006; Provan and Kenis, 2008). Third, there are accountability systems which clarify who a cross-sector partnership is accountable to and for what (Geddes and Shand, 2013; Page *et al.*, in press). Finally, there is the degree of openness of membership and clarity of roles (Huxham and Vangen, 2000), which may vary from fixed representation and explicit agreed roles, through to multiple people representing a partner with no pre-set assignment of roles.

Strategy

Strategy formulation in cross-sector partnerships is particularly challenging. Previous studies characterize the nature of strategy as multi-level (particularly as it involved delivery by the partnership and many partners), interconnected, dynamic and as a result rife with unintended consequences (Bryson *et al.*, 2006; Seitanidi, 2008; Clarke and Fuller, 2010; Vangen and Huxham, 2012). Therefore many authors emphasize that a major challenge in the formation and maintenance of cross-sector partnerships is the need to negotiate agreement about a shared purpose, but there is a dichotomy in the literature about the best way to overcome this problem. Following the dichotomy of Mintzberg and Waters (1985), some authors conclude that a deliberate strategy to which all partners sign up is necessary for success (Clarke and Fuller, 2010; Page *et al.*, in press), while conversely other authors emphasize the need for emergent strategizing (Seitanidi, 2008; Eden and Ackermann, 2013).

Leadership

The initial leadership challenge is to create the partnership (Crosby, 2010; Klijn *et al.*, 2010), which is aided by a brokering organization or convenor who is powerful, credible, committed for the long term, able to reframe and raise the profile of the problem, and has large social capital (Waddock and Post, 1991; Bryson *et al.*, 2006). Once the cross-sector partnership has been initiated, leaders need to balance the number and diversity of people involved, between a more democratic (Bryson *et al.*, 2006; Page *et al.*, in press) or

selective approach (Klijn *et al.*, 2010). Where conflict does arise, then leaders have an essential mediation role to play (Crosby and Bryson, 2010; Klijn *et al.*, 2010).

There is a dichotomy in the literature as to whether singular and collective leadership is essential. Some authors emphasize the need for a strong individual leader, either as a public sector, authority-based leader (Ansell and Gash, 2008; Crosby, 2010; Geddes and Shand, 2013) or a 'great-man' social entrepreneur (Waddock and Post, 1991). In these situations a consistent theme is the leadership style exhibited by the leader, which is variously described as facilitative (Ansell and Gash, 2008), integrative (Crosby and Bryson, 2010), or participative (Kolk *et al.*, 2010). Other authors emphasize the collective nature of leadership in cross-sector partnerships, whether these are community-led (Himmelman, 1996; Horlings, 2012) or complex public sector led, multi-sector collaborations (Sotarauta, 2005; Gibney *et al.*, 2009). Himmelman (1996) has subdivided collective leadership in cross-sector partnerships into a number of roles relating to the chair, figurehead and vision provider (convenor and catalyst), accessing and providing financial resources (conduit and funder) contributing expert knowledge (technical assistance provider) and various stakeholder engagement activities (capacity builder, partner, advocate, community organizer, facilitator). So, at one extreme, leadership in cross-sector partnerships has been characterized as centralized and enabling and, at the other extreme, it is seen as distributed and evolving.

Methods

The case of Flodden 1513 Ecomuseum was selected because:

- It cares for the tangible and intangible heritage of the physical area, which relates to the Battle of Flodden, between Scotland and England in 1513.
- It promotes social cohesion across the England–Scotland border, around what might otherwise be a divisive subject.
- It encourages additional tourism spend in this quiet corner of northern Northumberland and the Scottish Borders.
- The steering group contains a mix of people from private, public, not-for-profit and community backgrounds (some fulfilling more than one role), chaired by a community leader. As such, Flodden 1513 presents a good example of the ecomuseum concept.

The empirical material was gathered between August 2008 and the 500th commemoration event in September 2013. The collection of data was primarily motivated by the interest in ecomuseum as a challenging organizational form, that faces particular governance, strategic and leadership challenges and refer it to trends in the sector (Stake, 1995).

The selection of data collection methods was ethnography-inspired (Hammersley and Atkinson, 2003). During this study, one of the authors was professionally involved in the Flodden Ecomuseum project, which allowed for participant observation of the seven steering group meetings in the final year of the study (Agar, 1996). Detailed field notes were written up after each event. Access was also granted to minutes to the 28 previous steering group meetings from the inception of the group, and the two successful applications submitted for grant funding. The authors also had access to official ecomuseum documents, in particular two funding applications, which gave an overview on the core processes in this organization. In addition, a series of 14 formal semi-structured interviews were conducted to get participants' opinions (see table 1). Interviews took between 40 and 135 minutes. All interviews were recorded and transcribed. The data set was then interrogated by three theoretically-informed concepts: governance, strategy and leadership.

Abbrev.	Description	Period of involvement	Interviewed (Yes/No)
B1	Chair and landowner	Aug 08- Sep 13	Yes
N1	Local community development trust project manager	Aug 08- Jul 10	Yes
N2	Cross-border grant funded project manager	Aug 08-Feb 11	No
N3	Chair of Flodden battlefield charity	Aug 08- Apr 12	No
P1	Local authority heritage manager (role on Steering Group), local citizen, Leader+ -funded project manager, HLF-funded contractor	Mar 09-Sep 13	Yes (twice)
P2	Local authority economic development manager	Sep 09-May 11	No
P3	Local authority heritage manager	Mar 10 – Sep 13	Yes (twice)
P4	Local authority marketing manager	Mar 10 – Jul 12	No
N4	Local community development trust manager	Sep 10 – May 11	No
P5	Local authority Councillor	Feb 11 – Apr 12	No
B2	Landowner	Feb 11 – Sep 13	Yes
P6	Local authority tourism manager	Feb 11 – Sep 13	Yes (twice)
C1	Local citizen	Feb 11 – Sep 13	Yes
C2	Local citizen	Jul 11 – Sep 13	Yes
P7	Local authority economic development manager	Jul 11 – Dec 11	No
N5	Heritage trust director	May 12 – Sep 13	Yes (twice)
C3	Local citizen	Oct 12 – Sep 13	No
P8	Local authority heritage manager	Jun 13 – Sep 13	No
F1	Grants Officer from one of the funding bodies that awarded project funding	N/A	Yes

Table 1. People involved in the Steering Group with brief descriptions, showing who was interviewed. (B = business; N = not-for-profit; P = public sector; C = community; F = funder)

Flodden 1513 Ecomuseum

What later became the Flodden 1513 Ecomuseum began in August 2008 to commemorate the 500th anniversary of the Battle of Flodden on 9 September 1513 (Sadler, 2006; Goodwin, 2013). The vision was to mark the quincentenary; however, the people that met five years before the anniversary were less clear about how to achieve it:

I think that at the start it was very vague. We just knew that it was an important date. We knew that there needed to be some recognition of it (B1).

While it remained unclear exactly how they would deliver the vision, there was a feeling that their job would be engaging and supporting others as:

...the whole concept, not just the ecomuseum, the whole Flodden thing was that it was community driven (P3).

The initial step was to gather support through a local press article and the response was hugely positive. The idea of an ecomuseum came from a placement student and the endorsement of the first meeting of the stakeholder group set the initial course, how to commemorate the quincentenary and to ensure a long-term legacy. Next, they successfully applied for funding from the EC's 'Leader+' programme to set up the ecomuseum as a network of 12 sites, each of which tells part of the Flodden story—the centrepiece being the battlefield. This was followed by a more significant development grant from the Heritage Lottery Fund

(HLF), which included resources to support the community to commemorate the quincentenary and expansion of the ecomuseum to a network of 41 sites.

Structures and processes

For the first three years, there was little formality to the structures, just a simple hand-picked steering group and an open and growing stakeholder group, which at the quincentenary consisted of 350 individuals and organizations. This was adequate to manage the initial Leader+ project, in partnership with a local development trust managed by N1 that acted as project administrators. The key early on was not formal structure, but frequent and clear communication, with feedback to stakeholders about action taken:

[B1] has always been very keen on the stakeholder meetings...It was all about—‘we’re going to have a stakeholder meeting, so we need to have made progress’. So it was very much about the stakeholders...we’re the steering group, but the really important group are the stakeholders (N5).

This community-led nature of the project seems to have appealed to the funders:

...this is almost the most extreme case of a grant application genuinely coming from the community. Most of the time we see things allegedly coming from the community, but it has someone giving them a right good prod. This one is genuinely from the community (F1).

In preparation for the HLF grant, a community interest company was formed. To maintain flexibility they outsourced the day-to-day administration of the grant finances to a third sector heritage charity managed by N5. Likewise the staff engaged on the delivery were all contracted (not employed) by Ecomuseum Ltd, maintaining the flexible, distributed, networked nature of the organization. But this made the ecomuseum structure seem a bit complicated:

It was quite a complex thing to get your head round. There was the steering committee. There was the HLF project. The project runs some events, but most are independent. You’ve then got the Flodden Ecomuseum Company. The Ecomuseum network of sites itself. Not to mention the stakeholders and third sector project administrators (C3).

However, this complexity accommodated diversity and maintained a shared sense of purpose. Despite coexistence of different agendas at the steering group level, they were all generally running in the same direction and ‘had a common purpose’ (P1).

Strategy influences

There were three principle sources of influences on the direction and strategy that the group took. First, and the most significant, was the emergence of the idea of forming an ecomuseum and the consequences of that decision. Second was the significant influence of potential project funders:

I think some of [the strategy] will have been funding driven. So I suspect...the original model was ‘we want to celebrate the 500 anniversary, where can we get some money from?’ You can get some money from Leader+ but [laugh] you need to start talking about legacy (N5).

The third influence was the expert input of stakeholders:

When it started off, it was very much the local busybodies. Obviously over time, they brought in people that were taking in a slightly wider view, like [the public and third sector professionals], who started to think it needs to fit somewhere in the wider world. So I suppose that would change the nature of it as well (N5).

So from having no clear sense how to support the local community to commemorate the quincentenary, these three influences provided parameters to guide strategy formulation.

Leadership roles

The most significant role was played by B1 who convened the first meeting, and chaired all the meetings since then. He was described as the person:

...who had sufficient time, money, gravitas, connections to pull all that together (N5).

People know him and they know his reputation for getting things done (P1).

Never any discord...he has let it evolve and let the experts steer the evolution of it (P6).

The other key individual who played an important leadership role was P1, the heritage manager from one of the nearby local authorities. In contrast with B1's hands-off role, P1 was more interventionist and professionally knowledgeable. P1 was a technical heritage expert, but also had considerable experience of fundraising and project management:

I think the only other person who has been as important in this project as [B1] has been [P1]. He had full legitimacy as the knowledge expert. He was more urgent than [B1]—clearer idea of the work required. He positioned himself fairly early on that this was a project of a lifetime for him (P3).

However, while B1 and P1 have played the most significant leadership roles, many others on the steering group have also contributed significantly to the successful functioning of the collaboration and its delivery:

When [N1] says something, it's usually a serious point...during the development of the ecomuseum, he was driving force (P1).

[N3] for giving us all grief! [He] was always there saying 'this has got to happen' (N1).

[C2] has a valuable contribution to the committee. Because he was retired, he could put work into it. He'd read the papers before...he'd done a bit of prep. He provided a bit of authority. He'd mulled it over. He also had good community links (P3).

[P3] was really keen (N1).

[P6] is good at keeping [discussion] in context. Contribution to meetings was useful. Supportive and encouraging. If there was a blockage, he could help get round that (P3).

[N5] is good. He speaks common sense (C1).

In summary, it was the mix of leadership styles and roles that was critical to success. Strong, facilitative leadership was provided by B1, more directive leadership involving project development and fundraising was provided by P1, and many of the other people who were members of the steering group played critical roles in enabling the ecomuseum to succeed, both as a complex organization and in achieving its vision.

Ecomuseum or public sector led partnerships

The nature of the ecomuseum needs to be contrasted with the experience that ecomuseum steering group members had of other heritage cross-sector collaborations led by public sector professionals. One contrast, with two previous major historical events led by the public sector, was timing:

I'd seen other events that haven't worked. One of these was a great idea, but it didn't give itself enough time [the] budget [was given] at the 11th hour...It was thrown at [the professional leader] and he said 'I can't, you're a year too late at least' (B1).

Another contrast was the nature of the partnership:

If [a public sector organization] had got involved in Flodden it would be very different. They would have wanted to run the project in a way that they were comfortable with...rather than saying 'we're happy to be part of this in whatever way suits you' or 'we'll put ourselves at your disposal' (N5).

I think Flodden's the right approach. Where communities can take it on and have that ownership it's much stronger...If we, local government, had taken it on, there wouldn't have been the range of activities...I think it

would have been much smaller, with larger sums of money spent on smaller projects. So in terms of what we're doing there will be a legacy (P3).

So based on the responses of interviewees, there were significant differences between the ecomuseum and the typical, professional, public sector led partnership. First, previous partnerships had not given enough time to come to fruition; what became the ecomuseum was initiated over five years before the quincentenary. Second, respondents' experience was of other partnerships which were safe and top-down in the approach; Flodden, in contrast, tried to genuinely engage and respond to its broad stakeholder group. Third, professionally-led partnerships are unquestionably high quality; Flodden, however, offered better value for money. Finally, previous public sector partnerships were very discrete and focused; Flodden had, from very early in its development, focused on the very long-term legacy, delivering not only the commemoration of the quincentenary, but also creating the ecomuseum as a long-term catalyst for heritage, social and economic benefit.

Discussion

The Flodden 1513 Ecomuseum was constituted by an evolving mix of private sector landowners, public sector and not-for-profit professionals and individual citizens, who committed time and money in a shared decision-making process to contribute to the sustainable social, economic and environmental development of the area. It is therefore an example of a cross-sector partnership (Selsky and Parker, 2005; Bryson *et al.*, 2006).

In common with other cross-sector partnerships, it had two major challenges—it was resource intensive and it took a long time to come to fruition (Huxham and Vangen, 2005; Bryson *et al.*, 2006). However, significantly, another common challenge of cross-sector partnerships—failure to achieve targets—was not encountered, in that it successfully commemorated the 500th anniversary of the Battle of Flodden in September 2013, and has developed an ecomuseum network of 41 sites which together will continue to tell the important story of the battle.

Governance

The ecomuseum overcame the fundamental challenges of cross-sector partnership governance, too much or too little partner diversity (Huxham and Vangen, 2005; Bryson *et al.*, 2006) and gaining legitimacy (Page *et al.*, in press), in a novel way. It managed to have a very high degree of collaboration, while maintaining a low degree of formalization and centralization, in contrast with previous studies that assume an ever-deepening level of collaboration and concomitant formalization and centralization (Bryson *et al.*, 2006; Keast *et al.*, 2007; Page *et al.*, in press). It did this by developing rich interaction and deep commitment from partners who remained focused on the big issues, by only creating central bureaucracy when it was necessary and keeping this to an absolute minimum. From the perspective of the professional interviewees (P1, P6 and N5), this was the most unique aspect of this cross-sector partnership and a key factor in its success—a model they wanted to emulate elsewhere. Related to this was a minimal level of formal accountability that was only introduced when required. Finally, the stakeholder group welcomed all individuals and organizations, listening to and responding positively towards ideas and taking all major decisions back to them for discussion. More critically, it had a constantly changing, skills-based steering group of broadly representative individuals and organizations that remained task-focused and guided the content of the development. The governance structures have successfully contributed to gaining legitimacy and attracting considerable support from partners, stakeholders, the local community and grant-giving bodies (Bryson *et al.*, 2006).

Strategy

Critical to the success of the ecomuseum was the self-evident, fixed and positive nature of the vision—to commemorate the quincentenary. This negated the need to negotiate and renegotiate the overarching purpose, which can be problematic (Clarke and Fuller, 2010; Vangen and Huxham, 2012; Eden and Ackermann, 2013). The broad strategy was highly emergent with no single agenda about who should do what, when and with what resources. A case in point was the emergence of the idea of the ecomuseum,

which was totally serendipitous, yet acted as a catalyst for significant, broad community involvement. In this sense, the strategy was as complex as the process explained by Vangen and Huxham (2012) and Eden and Ackermann (2013), who describe cross-sector partnership strategy as multi-level, interconnected and dynamic, with the ecomuseum having individuals, community groups, partners and the partnership involved in decision-making and delivery. Yet during two discrete phases, an intended strategy was developed as the basis of grant-funding applications, which involved complex delivery by the community groups, partners in isolation and the partnership as a whole. This is very similar to the process described by Clarke and Fuller (2010), as is the constant feedback and need for adjustment during the implementation stage.

Leadership

The chair of the ecomuseum, B1, played a key leadership role that was critical to the overall success of the project. In contrast to the singular, participative and facilitative leadership role of B1, there was a second important person, P1, who had a more urgent and directive leadership style, and who used an expert knowledge of heritage management, fundraising and project management to influence the ecomuseum's development. B1 and P1's good working relationship was described as the 'twin pillars' of the ecomuseum. B1 and P1 did not take all the leadership roles: other steering group members contributed to the various leadership roles described by Himmelman (1996).

In summary, four forms of leadership were involved: a chair with a facilitative approach; a knowledgeable expert with a directive approach; both of whom worked closely together in a form of dual leadership; finally, a genuine inclusion of the steering group and wider stakeholder group in a distributed form of leadership.

Conclusions

The Flodden 1513 Ecomuseum is an example of a community-led, cross-sector partnership, growing organically in response to a local community need, in an era of austerity cuts to public sector provision and policy changes more generally that encourage community collectivism in local areas. The conclusions therefore have wider applicability to other community-led partnerships.

Our first conclusion is that diversity was embraced in the ecomuseum through three forms of governance:

- The ecomuseum managed a high degree of collaboration, while maintaining a low degree of formalization and centralization, in contrast to the more typical positive correlation between degree of collaboration, formalization and centralization reported in previous studies.
- There was a minimal level of accountability, whereas in public sector led partnerships transparent and formal accountability is often required or advised.
- The ecomuseum had a very open stakeholder group that was the ultimate arbiter, while having a capability-based, representative and constantly evolving steering group to do the business.

Strategy also differed from typical public sector led partnerships. Our second conclusion is that the ecomuseum's self-evident, fixed and positive vision has been a tremendous catalyst to success, avoiding the usual prescriptions (with their associated health warnings) about the need to negotiate and agree a purpose, and then renegotiate and agree the purpose as things change through time. The third conclusion, also relating to strategy, is that in contrast with theory developed in previous cross-sector partnerships which is either highly deliberate or highly emergent, the ecomuseum strategy has been both emergent (for example responding to the ecomuseum idea) and deliberate (when developing the two grant funding applications).

Finally, our fourth conclusion is that, unlike the established literature which argues that either strong individual or democratic collective leadership is required, we found a number of leadership approaches operating simultaneously:

- The chair had strong personal capabilities and a great social network, and convened the steering group and stakeholder group with an open, inviting, responsive and facilitative approach.

- A professional and experienced member of the early steering group provided a great deal of technical detail with a more knowledgeable and directed approach.
- These ‘twin pillars’ worked together with a dualistic, iterative and evolutionary approach.
- Many members of the steering group had taken on leadership roles, as had members of the wider stakeholder group, providing a distributed approach to leadership.

In summary, whereas previous public sector led cross-sector partnerships might be typified as mandated, closed, static, transparent, top-down, centralized and authoritative, the Flodden 1513 Ecomuseum is community-led, organic, open, evolving, ambiguous, bottom-up, distributed and facilitative in their approach to governance strategy and leadership. This is, of course, a simplification, nevertheless there is a clear contrast in a number of dimensions between public sector led and community-led partnerships, and in an era of austerity where policies promote local community action, the contrast is of wider interest.

The implications for practice are that public sector managers do not need to hold the naturally powerful, collaborative leadership roles—convenor, conduit and funder—that they used to (Bowden and Ciesielska, 2014). Increasingly this is the case in other situations, such as in LEPs and neighbourhood planning. When placed in these situations they therefore need to adapt to their new roles, leveraging the legitimacy gained through their technical assistance provider role to influence the direction and content of cross-sector partnerships. Likewise, people thrust into collaborative leadership roles in cross-sector partnerships from the private and third sectors, and citizens, need to learn new capabilities to maximize their contribution and enable their cross-sector partnership to be a success. Business schools can play a role in both areas of capability development.

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