

A COLLABORATION CHECKLIST

ASSESSMENT COMES FIRST: MIGHT THIS BE FOR US?

Our Big Picture

- What do we do well?
- Where do we have extra/sufficient capacity?
- What are we missing?
- We would do _____ if we had _____.
- What story do our financial statements tell?

Mission/Vision

- Where are we not fully living our mission?
- What, in our vision, seems unattainable?
- Who has similar or complementary missions?
- Who else shares a voice in advocacy?

Our Plans

- What in our plans requires something different of us?
- What are the barriers to our successful implementation of strategic or business plans?
- What are we missing?
- Have we included exploring collaborative opportunities in our plans? Are there measures?

Clients/Customers

- What do we not do enough of (from the perspective of our clients)?
- What else do they ask us for?
- What gets in the way of our help/support/our "product" being all that is desired?
- Who else do we hear about from our clients/customers?

Geography

- Who is close to us and close to our clients?
- Who is located where we are not, but we want to be?
- Is our space working for us?
- Would a shared location with others be helpful to those we serve?

Relationships

- Who have we worked successfully with in the past?
- Who do we see and interact with in the community?
- Who do we like/appreciate/admire?
- Are we present when conversations are happening?
- Do we prioritize networking?

Our Mindset

- Do we *want* to work with others?
- Are we intrigued or excited by what might be possible?
- Are the leadership team and the Board aligned in their thinking?
- Does the staff offer collaborative ideas? What do we do with those ideas?

BEST PRACTICES FOR COLLABORATION

Consider

- Gap between you and bigger agencies (are you at risk?)
- Invitations from others
- Funding support (funders have a “bias” toward collaboration)
- Internal and external financial trends
- Changes in environment (funding models; climate change; political)
- Capacity issues/hiring challenges
- What happens if we don't change?

Degrees of Collaboration

- Referrals to each other:** With policies, procedures, materials, training, and measurement
- Shared messaging for advocacy:** There is increased power with more, consistent voices
- Shared staff person:** Such as IT, intake, receptionist, finance, HR, and outreach
- Shared external resource:** Such as IT, HR, grant writer, (merging policies to govern)
- Space:** One site or multiple locations covering more geography
- Programming:** Education + services; health care + SDOH
- Affiliation/Subsidiary:** Each maintains identity; part ownership over the other
- Merger:** Two or more become one

Indicators that Collaboration will be Valuable

- Mission/Vision alignment is evident
- Both have collaborative values such as openness to change, flexibility, innovation
- Complementary services - in working together, you fill gaps in each organization
- When there is overlap, one is stronger than the other
- It brings us - or our clients - new or better resources
- Collaboration is less expensive than vendor and allows for greater expertise/understanding
- One organization receives higher reimbursement rates (which both could now get)
- The collaboration is a revenue driver

Moving Forward

- Explore:** Start with assessment; engage others; stay open to what might be
- Articulate:** Begin to put language and definition around our thoughts
- Flowchart:** Know how the linkages between organizations will happen - be precise
- Align:** Systems, processes, procedures, handoffs
- Negotiate:** Throughout, to the benefit of both overall, the collaboration, and always our clients
- Define Success:** How we will know whether to continue, expand, or disband
- Agree:** Legal but more than legal - speak your language, then add legal
- Plan:** A strong implementation plan and a robust feedback loop

Throughout the Process

- Transparency:** Board, Staff, Funders, Community, Clients
- Humility:** The needs of the organization must be more important than my own
- Openness to change:** Collaboration requires it
- Tackle the hard questions first:** Let's make sure we are willing to do what is hard before investing
- Agree on process to get to hard decisions:** How will we choose a new leader out of the three that want to lead?
- Consultants and lawyers:** Use them; they bring expertise and help move things along
- Recognize the cost:** the more extensive, the more expensive
- Commitment to staff:** But not specific roles
- Equal representation:** Regardless of size differences, especially in mergers
- Do things together:** Don't divide and conquer; you need to build understanding and agreement
- Do the work and keep your commitments:** Make continuous progress
- Persevere:** “If you are looking for an exit ramp, you will find one”