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?
- [ ] What systems do we work within?

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?
- [ ] Do we know who leads in our "space?"

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; systems-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 advocacy or system-change efforts:** There is increased power with more, consistent voices and strategies
- ☐ **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
- ☐ The collaboration is a revenue driver
- ☐ When we can challenge or align systems

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 who 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"