

TOOL

Assess your Collaborations: Explore, Commit, Continue or Exit

What it is

Collaborating with other organizations, groups and networks is a critical strategy for addressing the heavy demands placed on nonprofit organizations. It can help leverage resources, strengthen programs, and deepen mission impact. But many organizations rush into, or stay with a collaboration, without fully assessing how it advances the mission, and sometimes underestimate what's required to collaborate well.

This tool can be used by staff leadership to assess whether the organization is effectively exploring collaboration opportunities, selecting the right ones, for the right reasons, with the right partners or exiting them well. It can be used to:

Assessing your collaboration: A Story

In this small community, the organization is a key actor and often invited to participate in collaborations. The staff and Board felt pressure to engage and be an effective partner. During a governance workshop, they reviewed all their collaborations and identified those which clearly advanced the organization's mission, had trusted relationships and partners who were deeply committed to its success even when resources were scarce. This careful assessment affirmed that they were using their time wisely and selecting the right collaborations for the right reasons.

- Understand what success looks like at the different stages
- Identify information to be collected from your collaborations
- Make good strategic choices of collaborations, removing guess work and personal biases.

Click on any one of the topics in this tool to:

• **Explore potential collaborations,** including building authentic relationships, finding common cause and scoping potential collaborations





- Commit to a simpler, more informal collaboration (e.g. low risk and minimal resource requirements)
- Commit to a more complicated or complex collaboration (e.g. longer-term; higher risk; major resource implications)
- Continue to participate in a collaboration
- Exit your collaboration well

Learn more

- Foster Your Organization's Culture of Collaboration,
- Lead the Organization to Successful Collaborations,
- Map Your Organization's Collaboration Ecosystem,
- <u>Mitigate the Risks of Collaboration</u>,
- Provide Oversight of Your Collaboration's Evaluation
- Create or Assess a Memorandum of Understanding,
- <u>Checklist to Exit a Collaboration Well</u>



This resource was developed by Ignite NPS in partnership with the Tamarack Institute. Organizations are free to use this tool; however, proper credit must be given to the original creators in any use or distribution.





Explore Potential Collaborations

Introduction

This checklist is useful to determine whether the organization is taking the right steps to explore potential collaborations. It focuses on building authentic relationships, finding common goals with other organizations, networks and groups and properly scoping potential collaborations.

Checklist	Checklist		
Build and nurture networks and authentic relationships with other organizations, groups and networks.		Our organization sees itself as part of a larger system that goes beyond our own people and programs/services. We have a clear picture (e.g. mapping) of all those who are impacted by or can impact our mission (e.g. people, organizations, groups, networks) and have considered how they are interconnected.	
		<i>[See: Map Your Organization's Collaboration Ecosystem]</i> Our organization is continuously scanning for opportunities to work with other organizations, groups and networks, even those we think of as unusual partners.	
		The board and staff leadership approach relationship building with deep intentionality because they believe that positive, authentic relationships with those who are impacted or can impact our work is key to the organization's success.	
		Other organizations, networks and groups say that our board, staff and volunteers are good network weavers and collaborators (e.g. they pay attention to external relationships; connect diverse people and facilitate connections).	
Identify opportunities that could help to advance our purpose (mission, outcomes/impacts) by working together.		The board and staff leadership believe it's important to collaborate with other organizations, networks and groups. We're aware of the full range of collaboration opportunities and appreciate the unique nature of working collaboratively (e.g. there's comfort with shared decision-making and accountability). [See: Foster Your Organization's Culture of Collaboration]	





	Key people in our community (e.g. other organizational and community leaders; funders) say that our organization's mission and intended outcomes are clear, compelling and based on strong evidence of need.
	We participate in or convene conversations with a wide diversity of other organizations, networks and groups to explore common interests as well as differences in approaches and keep our organization and potential collaborations informed.
	We've considered which of our organization's opportunities, issues or challenges are best addressed by working collaboratively, recognizing more can be done together than as a single organization (e.g. reach different stakeholders; develop unique capacities; enhance programs; achieve greater impact, find efficiencies; create system change).
	There is energy among other organizations/communities, even a sense of urgency, to address these opportunities, issues or challenges together.
	There are potential partners who are available and interested in rallying around the opportunities, issues, or challenges we've identified.
	We've engaged potential partners in conversations about a collaboration idea, exploring hopes, possibilities, and shared and diverse interests, while also beginning to build trust between us.
Begin to engage in potential	We've considered the full spectrum of organizations, groups and people who are touched by the issues and opportunities we'd address in the collaboration and have sought them out as potential partners, welcoming a diversity of perspectives and experiences.
collaborations.	We have identified potential partners who would be good collaborators (e.g. positive organizational reputation; shared aspirations or philosophies of change; aligned values).
	Our staff leadership recognizes that the potential collaboration fits with our organization's purpose, strategies and priorities, and believe it's worth exploring.





We believe that our organization can add real value to the potential collaboration by contributing hard assets (e.g. staff and/or volunteer resources; technology; access to stakeholders; financial support) and soft assets (e.g. connections; knowledge),
recognizing that our contribution might vary at different stages of the collaboration.





Commit to a simpler, more informal collaboration

Introduction

Whether the organization is involved at the beginning of a collaboration's development or joining a mature one, it's important to be intentional about whether to participate in it. Not all collaborations are the right ones. The staff leadership can use this checklist to determine if the organization should commit to a simpler, more informal collaboration opportunity (e.g. doesn't require a significant commitment of time and resources and/or present major risk to the organization.

[Learn more: Collaboration: The Case, The Context and The Impact]

Suggested approach

- If **all** the boxes are checked with confidence, then the organization will proceed.
- If **many** of the boxes are checked with confidence but there are some concerns, determine if they can be feasibly addressed. If so, then proceed. If not, then it's a judgement call as to whether to commit.
- If **only a few** of the boxes are checked with confidence, then the organization should not proceed with the opportunity.





Checklist	
	There is a shared understanding among the partners about the collaboration's aspirations and desired outcomes and goals.
	The staff leadership believe that the people we serve would meaningfully and measurably benefit from the collaboration, and it clearly advances our mission, goals and priorities.
	The aspirations and intended goals can be better achieved through a collaboration than just doing it ourselves.
There's strategic alignment.	Our organization can make a valuable contribution to the collaboration (e.g. provide access to programs, resources and knowledge).
	We feel confident that the diversity of interests and needs of our partners (e.g. their motivations for participating; expected outcomes; philosophies of change) can all be reasonably accommodated.
	We don't have concerns about the reputations, ethics, practices or cultural differences of collaboration partners. If there are concerns, they aren't significant enough to stop us from moving forward and/or we're confident they can be effectively addressed.
	[Learn more: Foster Your Organization's Culture of Collaboration; Mitigate the Risks of Collaboration]
lt's a good investment	We're clear about our intended role in the collaboration, recognizing it may shift as the collaboration evolves. We also appreciate the capacities required to fulfil our role (e.g. skills, knowledge, experience, infrastructure) and are confident we can do it properly.
	[Learn more: Build Organizational Capacity for Effective <u>Collaboration</u>]
	We appreciate that collaborations evolve, shifting strategies and recalibrating the required resources. However, at this juncture we have a clear sense of the investment of time and resources required by our organization (e.g. the staff or volunteer time; infrastructure





	contributions, funds) and believe they are a worthwhile investment
	given the potential returns.
	At this importune in the cellaboration, we believe that there are enough
	At this juncture in the collaboration, we believe that there are enough
	resources available (e.g. people, funds, infrastructure) to measurably
	advance its aspirations and goals. If this isn't the case, we're
	confident they can be accessed, or the collaboration's aspirations
	and goals can be reasonably modified.
	Along with the potential risks noted above, we have considered any
	other significant risks to our organization and feel that they can be
	effectively mitigated at this time.
	[Learn more: <i>Mitigate the Risks of Collaboration</i>]
	There is a high level of trust among partners. This is driven by
	principles and processes that determine how they behave with each
	other; clarity about who makes decisions and how; and the ways that
	those impacted by the work are engaged.
	We're clear about what success looks like for the collaboration, even
	though it may not yet be clear how it will be achieved. At this
	juncture, we believe that achieving success is feasible.
There's	The collaboration's partners have developed, and agreed to, a road
confidence the	map for achieving its aspirations, goals and outcomes. This includes
	the assumptions being made and the challenges that may be faced.
collaboration can	
be/or is	Note: A newer collaboration may only have a rough road map.
effectively	
implemented.	The collaboration has thought about and/or put in place processes to
implemented.	measure progress toward its goals and outcomes that appear sound
	(e.g. robust, feasible).
	(e.g. lobust, leasible).
	Note: Collaborations are different from organizations and may
	require unique ways to evaluate their progress and success (e.g. as a
	continuous cycle of feedback, learning and adjustments,
	acknowledging the need for diverse and flexible measurement
	systems that meet the needs of all the partners).
	[Learn more: Provide Oversight of Your Collaboration's Evaluation]
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	The collaboration has thought about and/or clearly outlined how it
	will communicate between partners and their organizations (e.g.
	timing, transparency, scope) which, at this stage, seems sound.
	Our staff or board participating in the collaboration are committed to
	its success and our organization fully supports them (e.g. provides
	the appropriate time and resources; incorporates responsibilities in
	their job description and performance review; empowers them to
	make decisions with collaborative partners without checking back).
	[Learn more: Build Organizational Capacity for Effective
	<u>Collaboration</u>]





Commit to a more complicated, or complex collaboration

Introduction

It's important for your organization to make an intentional choice about whether to participate in a collaboration. Not all collaborations are the right ones. Staff leadership can use this checklist to determine if the organization should commit to a collaboration. This decision might be triggered by the need for leadership approval, the need to sign a Memorandum of Understanding and/or the need to allocate resources.

This checklist is focused on more complicated or complex collaboration (e.g. those that require a significant commitment of time and resources; have substantial implications for the organization, such as a shift in program or resource allocation; or present major risk to the organization)

[Learn more: Collaboration: The Case, The Context and The Impact]

Suggested approach

- If **all the boxes** are checked with confidence, then the organization will proceed.
- If **many of the boxes** are checked with confidence but there are some concerns, determine if they can be feasibly addressed. If so, then proceed. If not, then it's a judgement call as to whether to commit.
- If **only a few** of the boxes are checked with confidence, then the organization should not proceed with the opportunity.

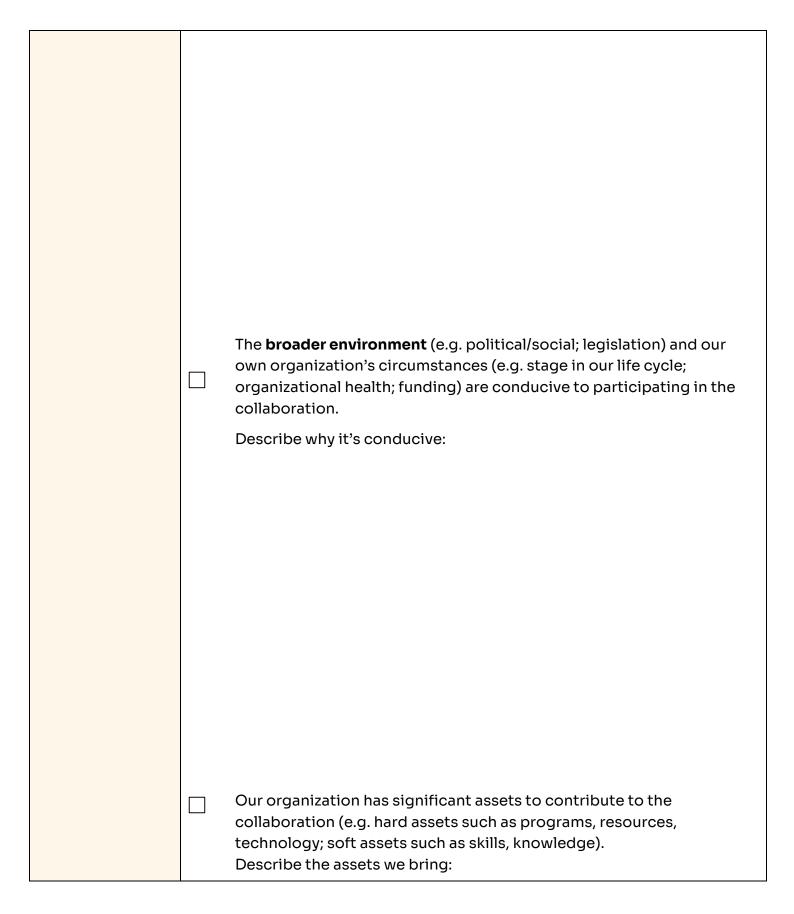




Checklist	
	There is a shared understanding among the partners about the collaboration's aspirations and desired outcomes and goals. Describe them:
There's strategic alignment.	The board and staff leadership believe that the people we serve would meaningfully and measurably benefit from the collaboration, and it clearly advances our mission, goals and priorities. Those who actively participate in our organization would agree (e.g. staff; those who benefit from our programs; funders). Describe how the organization benefits:
	The aspirations and intended goals can be better achieved through a collaboration than just doing it ourselves. Explain why:

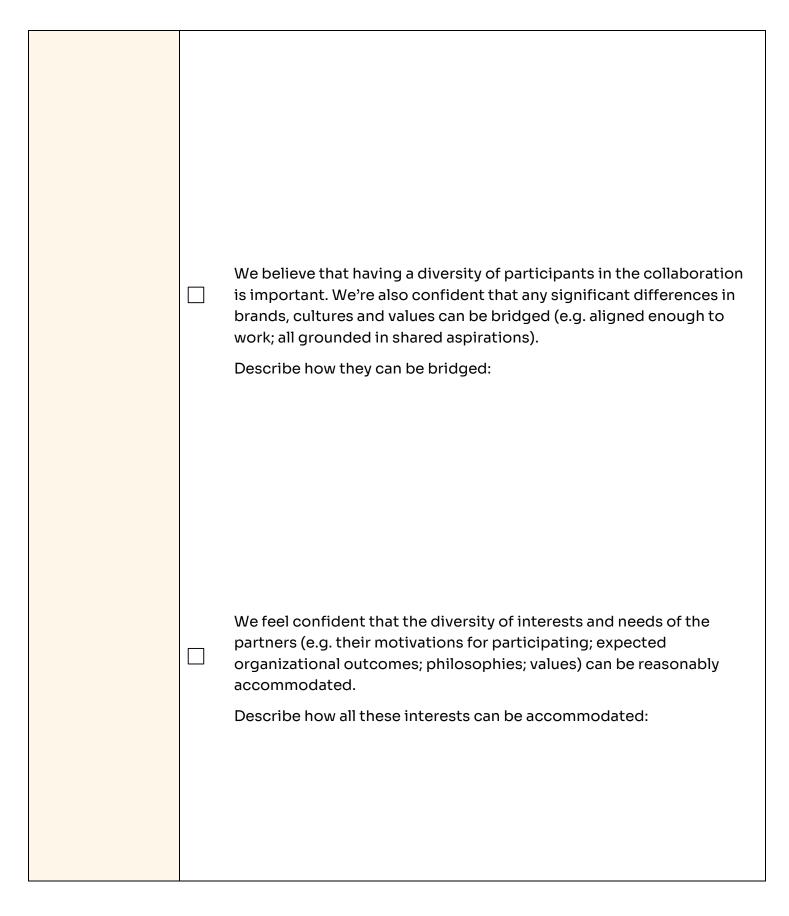






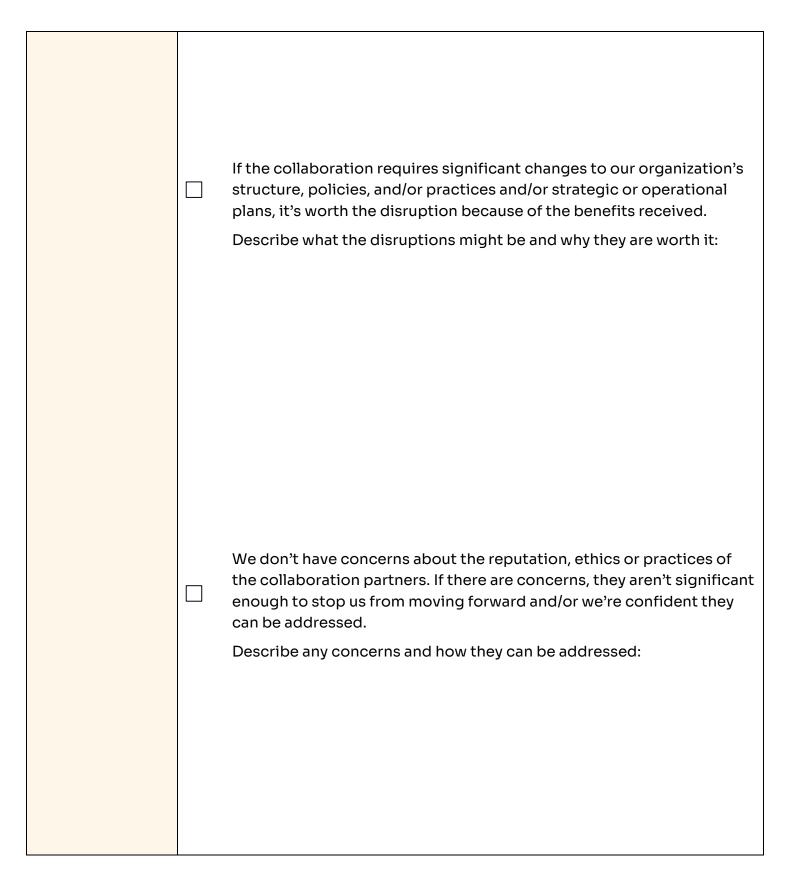












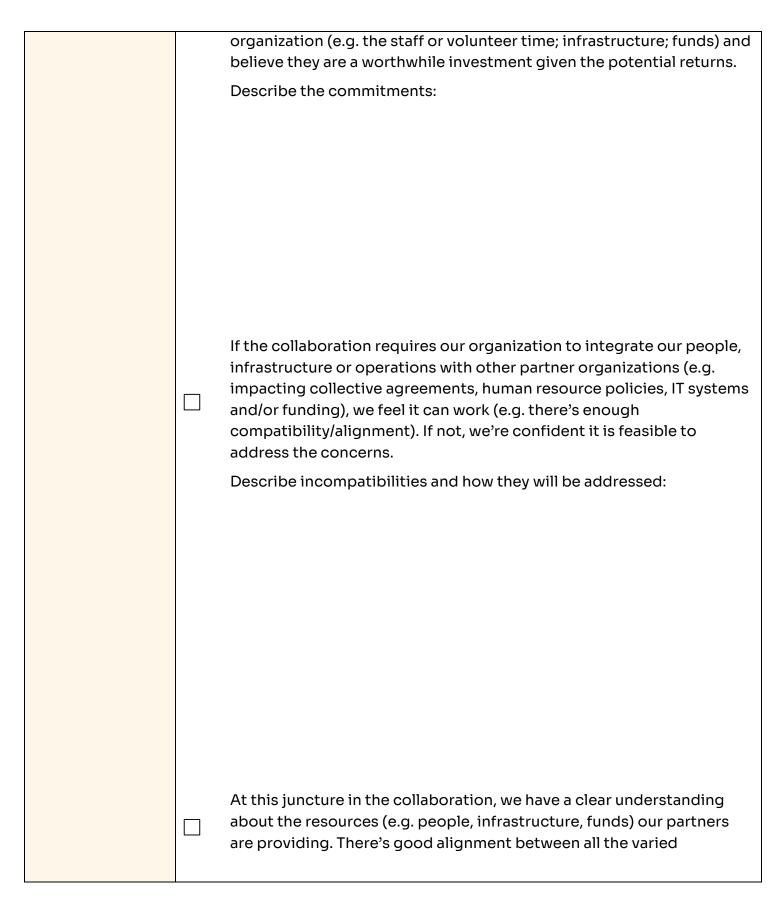




	We're clear about what the collaboration's success looks like, even though partners may not yet know exactly how it will be achieved. Describe what success looks like:
It's a good investment	We're clear about our role in the collaboration (e.g. lead or contributor; backbone), even though it may shift. We appreciate the capacities required to fulfil it (e.g. skills, knowledge, experience, infrastructure) and are confident we can do it well. If it's a more intensive role, the partners all agree that we are well-equipped to fulfil it effectively. Describe the expected role and required capacities:
	We appreciate that collaborations evolve, shifting strategies and recalibrating the required resources. However, at this juncture we have a clear sense of the investment of time and resources required by our











contributions. We're confident the partners can fulfil their commitments and, if not, strategies to mitigate this are in place.
Describe their contributions and how they align with ours. If they are available, describe strategies for addressing shortfalls:
At this juncture in the collaboration, we believe that there are enough resources (e.g. people, funds, infrastructure) available to measurably advance its aspirations and goals. If this isn't the case, we're confident they can be accessed, or the collaboration's aspirations and goals can be reasonably modified. Describe what gives us confidence:

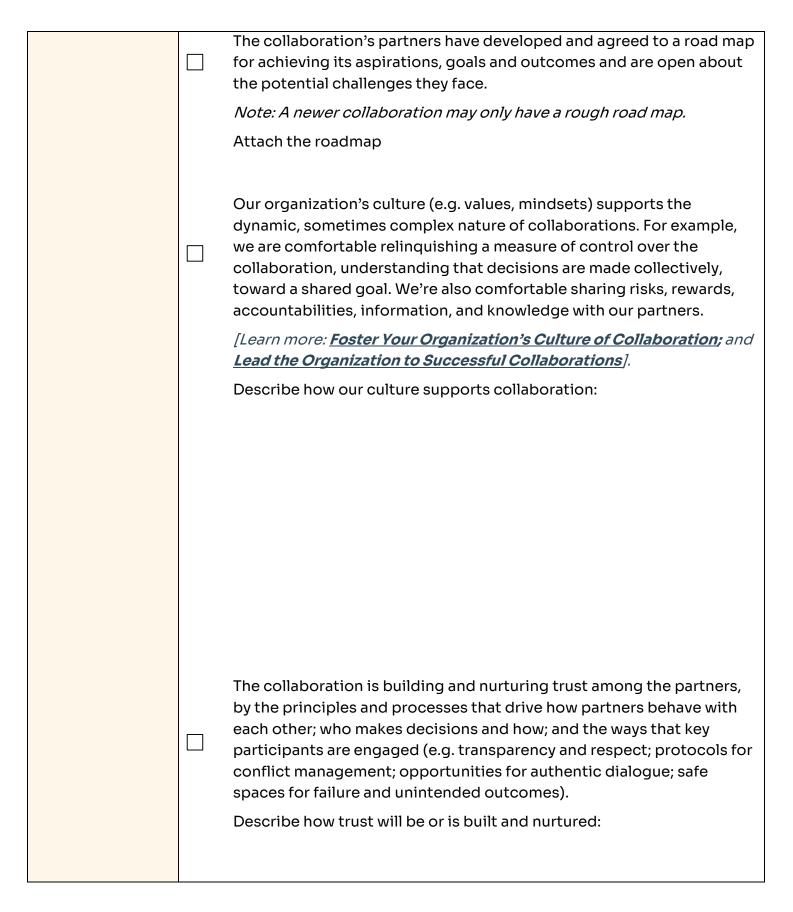




	Along with the potential risks noted above, we have considered other significant risks to our organization and believe, at this time, that they
	can be mitigated.
	[Learn more: <i>Mitigate the Risks of Collaboration</i>]
	Describe the potential significant risks and potential mitigating strategies:
	There's a sense of urgency to achieve the aspirations and goals of the collaboration in the broader system as well as among the partner organizations (e.g. because they are pressing issues that need resolution and critical outcomes).
	Describe what's driving the urgency:
There's confidence the collaboration is/or can be effectively implemented.	

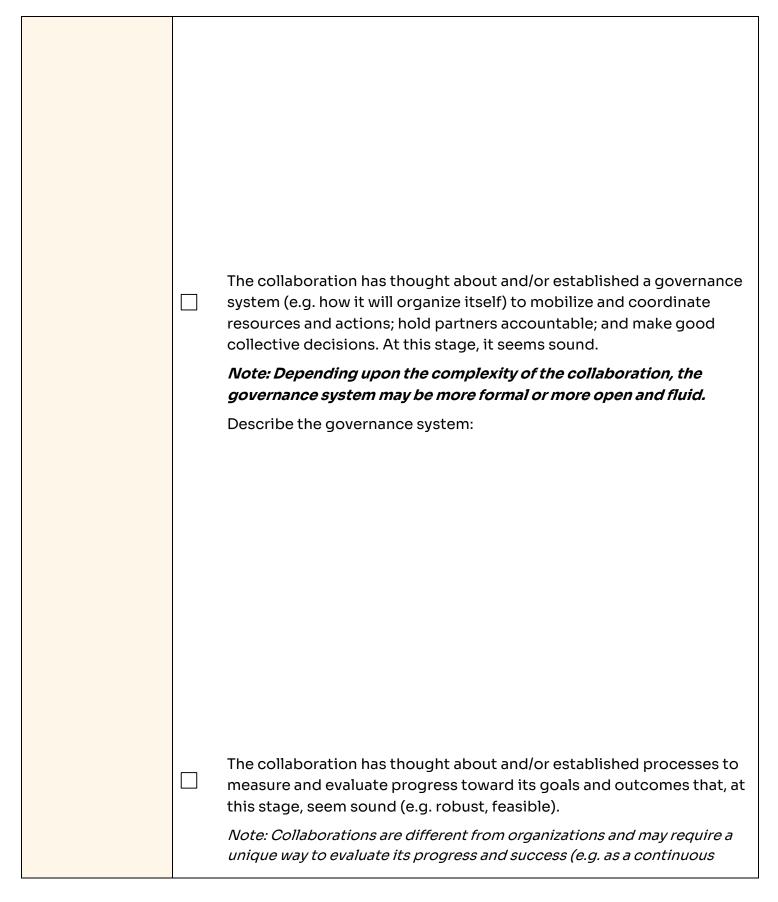
















	cycle of feedback, learning and adjustments, acknowledging the need for diverse and flexible measurement systems that meet the needs of all the partners).
	[Learn more: Provide oversight of Your Collaboration's Evaluation]
	Describe the key features:
	The collaboration has thought about and/or clearly outlined how it will communicate between partners and their organizations (e.g. timing, transparency, scope) that, at this stage, seems sound. Describe the key features:
	Our staff and/or volunteers responsible for making the collaboration work are committed to its success. Describe how you know this to be true:





	We support the staff who are participating in the collaboration (e.g. provide the appropriate amount of time and resources; alter workloads; incorporate the responsibilities in their job description and performance review). We're comfortable empowering them with the authority to make decisions and work toward collective goals at the collaboration table.
	[Learn more: Build Organizational Capacity for Effective Collaboration; Foster Your Organization's Culture of Collaboration]
	Describe the supports in place and how staff are empowered:
	If a formal agreement between collaborative partners is required, it clearly outlines expectations (e.g. roles, responsibilities, obligations, risks and accountability mechanisms, exit strategies). The board and staff leadership are all comfortable with the content of the Agreement.
	[Learn more: Create or Assess a Memorandum of Understanding]
	Attach agreement.





Continue to participate in a collaboration

Introduction

Organizations should remain in collaborations for the right reasons. The decision of whether to continue participation is usually triggered by circumstances, such as:

- Concerns about the effectiveness of the collaboration
- The departure of, or low engagement by key collaboration partners
- The collaboration entering a phase of renewal
- A significant shift in the direction of the collaboration (e.g. reaching an important milestone)
- A major shift within your organization (e.g. change in priorities, directions, access to resources).

This checklist helps the staff leadership determine if your organization should continue in the collaboration or exit it.

Suggested approach

- If **all the boxes** are checked with confidence, then the organization will continue.
- If **many of the boxes** are checked with confidence but there are some concerns, determine if they can be feasibility addressed. If so, then continue. If not, then it's a judgement call as to whether to continue.
- If **only a few** of the boxes are checked with confidence, then the organization should not continue with the collaboration.





Checklist			
There's continued strategic alignment.		Our organization's external environment (e.g. political/social; legislation) and our own organization's circumstances (e.g. stage in our life cycle or organizational health) remain conducive to our participation.	
		The collaboration continues to benefit our core partners and meaningfully and measurably advances our mission, outcomes, goals and priorities.	
		We collaborative partners continue to believe and agree that our organization has important assets to contribute (e.g. hard assets such as programs, resources, technology; soft assets such as skills and knowledge).	
		The differences in brands, cultures, and values as well as the interests of the collaborative partners are being addressed effectively.	
		The reputations, ethics or practices of partners have not been an issue for the collaboration. If there is an issue, we believe it will be addressed effectively.	
		Any significant changes to our organization's structure, policies, practices (e.g. performance or financial management systems) and/or strategic or operational plans, continue to be worth the disruption because of the benefits received.	
It remains a good investment		Collaboration partners have a clear and shared understanding about what success looks like and know the collaboration's aspirations and intended outcomes.	
		The collaboration has made significant progress on achieving its aspirations and intended outcomes. The evaluation mechanisms and progress reports give us this confidence.	
		[Learn more: Provide Oversight of Your Collaboration's Evaluation]	
		Our staff leadership, and the board (in the case of more complex and higher risk collaborations) remain committed to it.	





	In the case of collaborations which require significant commitments,
	we've demonstrated to those who participate in our organization (e.g.
	donors, funders, the people we serve or impact) that it's a worthwhile
	endeavor.
	Mast of the collaboration partners and observices (a.g. fundares key
	Most of the collaboration partners and champions (e.g. funders; key
	influencers) remain committed and engaged. If this isn't the case, then
	new partners have joined who bring passion and the right kind of
	competencies and resources to enable continued momentum.
	If the collaboration requires significant commitments from our
	organization, we are confident that we can continue to fulfil our role
	effectively (e.g. lead or contributor; backbone), bringing the right kind
	of capacities to it.
	-
	[Learn more: Build Organizational Capacity for Effective
	<u>Collaboration</u>]
	The required investment of time and resources by our organization (e.g.
	the staff or volunteer time; infrastructure; funds) remains worthwhile
	given the potential returns
	given the potential rotaling
	Any integration of our people, infrastructure, or operations (e.g.
	collective agreements; human resource policies; IT systems, funding)
	with those of our partners has been done effectively. If not, we have
	strategies we are confident will improve it.
	The partners in the collaboration are fulfilling their respective roles,
	resources commitments, accountabilities, and other obligations. If this
	isn't the case, there are reasonable strategies to address the shortfalls.
	There are enough resources (e.g. people, funds, infrastructure)
	available for the collaboration to meaningfully and measurably advance
	its aspirations and goals.
	Along with the potential risks noted above, any other risks to our
	Along with the potential risks noted above, any other risks to our organization have been mitigated or have strategies in place to address
	them.
	[Learn more: <u>Mitigate the Risks of Collaboration</u>]





It is being effectively	There is a clear and feasible road map for achieving the collaboration's aspirations, goals, and outcomes, which all partners support. Any course corrections in the road map are reasonable and have increased impact.
	The collaboration has built and nurtured trust among all its partners. If not, there are clear and feasible strategies to accomplish it (e.g. refine the principles driving behavior, decision-making and engagement; ensure partners are abiding by them).
	In the case of more formal, complex collaborations, the collaboration has an effective shared governance system (e.g. how it will organize itself) to mobilize and coordinate resources and actions, hold the collaboration accountable, and make good collective decisions.
	The collaboration has robust evaluation mechanisms in place to gather learnings, demonstrate progress toward its goals and capture both intended and unintended outcomes. The evaluation mechanisms are generating information that all partners believe to be valuable, timely, honest, and comprehensive.
implemented	[Learn more: Provide Oversight of Your Collaboration's Evaluation]
	There are clear mechanisms to review and revise the collaboration's processes, protocols and structures as it evolves so they remain relevant, feasible and effective in advancing the purpose of the collaboration.
	The collaboration has communicated effectively with those directly participating in the collaboration, their respective organizations and those who are impacted.
	The staff or volunteers from our organization who are directly participating in the collaboration remain committed to its success
	Our staff or volunteers participating in the collaboration say they are being effectively supported by staff leadership (e.g. providing the appropriate time and resources; altering workflow; grounding the collaborative work in their job description and performance review; empowering them to make decisions at the collaborative table)





Any formal agreements between collaborative partners have been revised, if necessary, to adapt to changed circumstances as the collaboration has evolved.
[Learn more: Create or Assess a Memorandum of Understanding]





Exit Your Collaboration Well

Introduction

Organizations exit collaborations for many reasons, including:

- A shift in their circumstances and priorities
- Inability to fulfil commitments
- Concerns about the effectiveness of the collaboration (e.g. lack of resources; disengaged partners and supporters; tensions between partners; shift in goals)
- The collaboration has served its purpose and achieved its goals

It is important to exit a collaboration well so that relationships with partners remain positive and your exit is not disruptive to the shared work. In the case of collaborations that require more significant organizational commitments, it's particularly important to consider how to exit as respectfully, feasibly, and positively as possible.





Checklist	
	We have a clear, written rationale for exiting the collaboration based on a thoughtful evaluation of our organization's contributions and current circumstances.
	The learnings from the collaboration experience have been captured for reference when participating in other collaborations.
Staff leadership can use this checklist to create the exit strategy and assess how well it's done	The staff leadership (and if appropriate the board) agree that the organization should exit the collaboration. If other staff have been engaged in the collaboration, they also agree. If this isn't the case, then an appropriate consensus has been reached.
	We have a plan to communicate the rationale for exiting the collaboration to our partners in a positive and productive way.
	If the collaboration is more formal and/or complex, we will take the time to engage in conversations with all the key partners, so that positive relationships are maintained.
	If tension between partners makes it hard to have positive conversations (e.g. distrust, disappointment, frustration), there is a plan to rebuild key relationships over time.
	We have laid out a timelines and process for our organization's exit from the collaboration, which our partners agree are reasonable and transparent.
	<i>Note: Ideally the collaboration has outlined how partner's exit a collaboration and documented it in a Memorandum of Understanding.</i>
	If human, financial or other assets have been shared, there is a clear understanding with the collaborative partners about how they – including funding arrangements – will be handled.
	If there has been an allocation of staff dedicated to the collaboration, our organization and partners have worked out how the transition can be handled as seamlessly as possible.





	If there was shared infrastructure, data, systems and other capacities, there is an agreement for how they will be unbundled and reallocated in a way that is least disruptive to the collaboration.
	If it makes sense, we will continue to indirectly support the collaboration effort (e.g. championing it; sharing updates internally).



