TOOL
Checklist to Exit a Collaboration Well

What it is

Your organization may decide to leave a collaboration before it completes its purpose and while it is still active. This tool provides a checklist of considerations that enable your organization to anticipate and address issues, communicate its rationale, manage needed procedures and leave the collaboration well.

Considerations

Anticipate and address issues

☑ **Determine if there is anything the organization can do to mitigate the issues or concerns.**

Remember that there are some risks associated with exiting a collaboration (*e.g. future relationships with partner organizations; reputation in the community as a collaborator; loss of influence in the collaboration's direction; lost access to important information/data; loss of the investment of time and resources already committed*), so it's important to ensure that leaving the collaboration is the only viable option.

Here are some remedial steps to consider:

- Encourage the collaboration to shift its priorities to better align with your organization's mission, while remembering that such a decision must be agreed to by all partners.
- Identify different ways the organization could continue to contribute to the collaboration and still add value. This could include sharing information, continuing to promote the work of the collaboration, and/or participating in community gatherings hosted by the collaboration.
- Identify feasible actions that can be taken to strengthen/re-energize the collaboration (*e.g. engage new partners or funders, address conflicts*).

Rationale for Leaving

Clearly and concisely articulate your rationale for leaving the collaboration in writing.

If your organization is playing a significant role in the collaboration (*e.g. providing staff, resources, infrastructure; a conduit for funding*), the staff leadership and board, if appropriate, must agree with the rationale for exiting.

There could be many reasons for exiting a collaboration which is still formally in place. These include:

- Changes in your organization's circumstances (*e.g. shift in purpose or priorities; significant staff changes or loss of resources*) that might result in significant misalignments or an inability for the organization to continue to contribute effectively.
- The collaboration isn't achieving its intended outcomes or is losing momentum (*e.g. disengaged partners; a key convenor leaves; priorities of some partners have shifted)*.
- There are significant concerns about risks (*e.g. to the organization's brand or reputation; loss of key funding to the collaboration without clear replacement*).

Create a clear strategy for communicating the rationale for exiting to collaboration partners, honestly, positively and constructively, without leaving any room for misinterpretation.

This will be important to future relationships with partners and to your reputation as a collaborator. Consider who needs to be informed, when and by whom. Ensure that the rationale has been received accurately by all key partners. If it's not considered to be a reasonable rationale by key partners, then understand why they think so and try to address the issues. It might also be important to communicate the rationale to your own stakeholders, such as your funders, the people served/impacted, and other staff.

Procedures for exiting

To successfully exit a collaboration, it's important to enter it well.

This means helping ensure the collaboration puts the right culture, people and processes (*e.g. decision-making, conflict resolution, resource procurement and allocation*) in place from the beginning and then continue to pay close attention to the progress of the collaboration throughout its evolution.

*[Learn more: **Collaboration Success Factors Checklist**]*

More complicated and complex collaborations should have an agreement between partners that clearly lays out the exit procedures

*[Learn more: **Create or Assess a Memorandum of Understanding**]*

These procedures can include:

- Expectations for transparency and notification timelines between partners when exiting the collaboration.
- Strategies for handling the collaboration's assets and funding arrangements.
- Actions that need to be taken to unbundle shared infrastructure, data and systems, and if necessary, how they will be reallocated to other partners.
- Expectations for extracting staff or other resources that the organization has provided to the collaboration (*e.g. timing or phasing*).
- An outline of other obligations the organization has to the collaboration once it has exited, such as participation in reflections (*e.g. learnings from the experience*) or opportunities for continuing benefits (*e.g. to those served/impacted by the organization*).

*[Learn more: **Assess Your Collaborations: Explore, Commit, Continue or Exit**]*