"Let's Collaborate" Checklist

Collaboration. Co-Labor. Laboring together.

One of the promises of collaboration is that the whole is greater than the sum of the parts. As a manager you have to pick which collaborations make sense for the limited resources of your organization. I'm talking about the obvious things like staff time and energy, money. I'm also talking about the valuable intangible assets like reputation, relationships, programming, systems for getting things done, and key knowledge.

Is this a Good Fit?

No one likes to wear shoes that don't fit. The same is true when you're working with others to make an impact! Collaboration doesn't have to be a perfect fit. BUT, you also shouldn't find that your primary, non-negotiable value is in conflict with how others do their work. Do you trust your potential partners? Are you all in agreement about how urgent the issue you're working to address is? Do you have any reservations about the balance of power and can that be managed in a way that gets you to "yes"? If you are unsure about the fit of any of these dimensions, have more conversation. All collaborations take effort, so go in knowing where you will need to do some fundamental relationship work.

☐ Mission
☐ Values
☐ Goals
☐ Trust
☐ Timeline and Sense of Urgency
☐ Decision Making
☐ Power Dynamics

Why Us?

If you're being asked to collaborate, then your organization is being invited in because you bring some unique value to the work. If it's not clear to you why you're being asked to collaborate, or if there's a significant power imbalance, take some time here. What does your organization know, do, or have access to that makes you a valuable member of the collaboration? (The Know Your Value worksheet can help, too.) Because you'll be laboring in some way in this collaboration, what complementary skills and capacity does your organization bring to the table? How critical are those skills to the success of the collaboration?

☐ Your Unique Value - what does each organization bring that the other could not or does not want to do alone?
☐ Complementary Capacity/Skills - what staff, financial, or other resources do each of you bring that make working together better for both of you?

Why Them?

Essentially this the reverse of the above. You want what you bring to the table to be valued and respected. Take the time to honestly assess what the other partners bring.

☐ What's Their Unique Value - what does each organization bring that the other could not or does not want to do alone?
☐ Complementary Capacity/Skills - what staff, financial, or other resources do each of you bring that make working together better for both of you?

Getting Down to Business

It's also important to know what the expectations are for the items below before you sign the MOU. For example, it's not helpful to share your copyrighted program materials in the collaboration without also clearly identifying it as your Intellectual Property and subject to whatever rights you've retained. Is there going to be an acceptable effort from all partners to ensure that your team isn't doing all of the work? How will the collaboration discuss and take advantage of opportunities? How will you share and celebrate success? How will you navigate challenges? Do all of the members of the collaboration share the same decision making authority at their organizations? If not, how will that impact collaborative action?

☐ Tangible assets - what facilities, materials, or financial resources are each of you willing to dedicate? What resources are still needed to make this collaboration feasible for both of you?
☐ Revenue generation - is the goal to generate revenue for one or both organizations? How will you allocate costs and revenues accordingly?
☐ Intellectual Property (IP) assets - will you be joining intellectual property or creating new intellectual property together? It's important to discuss and agree to the following: who will be the owners of any new IP, what will each organization's rights in using the IP and to what ends, what will your rights be to license the IP to others and under what circumstances? If your are in similar markets, how will you navigate potentially competing with each other?
☐ Network and Social Capital assets - will your relationships be available to this collaboration? Under what conditions?
☐ Staff skills, time, and knowledge - what are you willing to allocate to this work knowing that at this point in time it's likely a Research & Development investment for each of you?
☐ Time commitment expectations - beyond the work of the collaboration, how much time do you expect this collaboration will require of each of you?
☐ Decision making authority - what is each representative's freedom of decision making on behalf of their organization as part of this collaboration? If it's not the same, how will the collaboration make time for deliberations by partner organizations?
☐ Sharing opportunity/celebrating successes - how do you want to publicize or share your collaborative efforts? Who needs to agree to any messaging used?
☐ Managing challenges/navigating mistakes - what are the mechanisms for setting goals and handling the inevitable hurdles of any project?

Bonus: When you're ready to commit, or for those that are already in collaboration and want to strengthen it or revitalize it, you can also use the above list to hit the reset button. Also, if you're in a group that's stuck, spend some time reviewing the items below and see if that can get you back on track.

☐ Group norms for working together
☐ Accountability methods/processes and enforcement
☐ Executive freedom to commit their organization to a collaborative strategy
☐ Changes in trust among the members

If you have any questions, or want to share any "aha" moments this sparked for you, email me at WalkerPhilanthropicConsulting@gmail.com.

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