

# HOW WELL PREPARED ARE WE TO COLLABORATE OR MERGE?

This checklist is based on feedback from recipients of Working Together More Fund grants to collaborate or merger.

It's a "front-line" set of considerations to work through alone—or with your team, partner organisations, or trustees when considering collaborating or merging. When you're ready to collaborate, check the 'Ready to Collaborate' checklist to help get you started.

Your own experiences are invaluable in continuing to develop this checklist. Please [pass on any learnings](#) from your collaborations to us and [let us know](#) if this checklist was helpful or how we might increase its usefulness.

## PLANNING

- Have we explored the full potential of our idea? It may be far greater than we think. Challenge and remove any "blinkered" thinking.
- What is driving the idea behind our project? Better service? Expanded services? Greater efficiencies? It helps if everyone knows and agrees a purpose. Have we *clearly* defined our goals and expectations?
- Have we identified all relevant stakeholders? Do they include those who receive/use our services?
- Do we know how we will ensure equality of power in our stakeholder relationships?
- Have we a shared, over-arching goal or vision to help overcome obstacle and keep everyone focused?
- Do all stakeholders fully understand the intentions and purpose of the collaboration?
- A Memorandum of Understanding (MoU) can assist if unexpected staff changes occur. during the project. It clarifies process, roles and relationships of partner organisations. How will we manage any unexpected staff changes?
- How will we start the collaboration process? Is a "big gathering" a good way to bring people together, get them on board and motivated? The start is a good time to reduce any apprehensions that may later lead to blockages. Go slow at the start to then move quickly later on.
- Is it appropriate to break tasks into stages e.g. exploration, consultation, implementation? This can assist when approaching the WTMF as often one stage leads to changes in those that follow – along with changes to budgets.
- Who will lead the project? Someone with skills, mana, commitment and the ability to effectively delegate — an organisation which is respected by the partners and has capacity?
- Have we agreed on a process for governance level decision-making?
- What are our agreed "success criteria" – indicators that show we are achieving what we want? These can be valuable and help focus project discussions.

## ORGANISATIONAL

- If our project involves a national organisation with branches - do we/they know how to communicate during the process and participate in making key decisions?
- What cultural (both ethnic and organisational) and values differences, along with commonalities, exist among partnering organisations? What might be the implications of these?
- Are there any Intellectual Property issues that will/might need to be addressed?
- Are we willing to let go of things dear to us and be open to new ideas?
- If participants are in different locations, can we bring them together for face to face meetings? Remember to include costs for this in your WTMF application – travel, venue, catering etc

COMMUNICATION	<ul style="list-style-type: none"> <li>→ Communication is THE big one! Open communication is key. Have we given thought to the need to consult, plan, communicate? <input type="checkbox"/></li> <li>→ Are we clear and explicit about what each organisation wants to achieve? We will need to listen twice as much as we talk to ensure in-depth understanding. <input type="checkbox"/></li> <li>→ How will we manage internal and/or external conflicts if or when they arise? Pick your battles! <input type="checkbox"/></li> <li>→ Are all our boards, managers and staff aware of and – ideally – supportive of what is being considered or planned? If not, how will this be resolved? <input type="checkbox"/></li> </ul>
PEOPLE / SKILLS / KNOWLEDGE	<ul style="list-style-type: none"> <li>→ Is “ownership” of the collaboration/merger shared by all? This is especially important when collaborating – it may not always be possible in a merger but is desirable. <input type="checkbox"/></li> <li>→ Are we aware of any “ego” or “ownership” issues that might block progress – including our own? <input type="checkbox"/></li> <li>→ What incentives have we got to motivate people? Such as celebrations to mark key achievements (e.g. time off, gifts etc) <input type="checkbox"/></li> <li>→ What expertise do we and our partners already have “in-house”? Go beyond skills associated with roles to other attributes they could bring. <input type="checkbox"/></li> <li>→ Do we need training or external guidance to support our collaboration/merger? <input type="checkbox"/></li> </ul>
TIME	<ul style="list-style-type: none"> <li>→ Collaborations almost always take longer than expected. Have we the time to see this idea through to completion? Estimate time realistically. <input type="checkbox"/></li> <li>→ Have we allowed time for thinking and reflecting? <input type="checkbox"/></li> <li>→ How realistic is what we are hoping to achieve? <input type="checkbox"/></li> <li>→ What are the obvious barriers we may strike and how might we overcome these? <input type="checkbox"/></li> <li>→ How will our (always busy and usually unpaid) board members be able to commit time to build relationships and be involved in the process? Move at a pace that works for people. <input type="checkbox"/></li> </ul>
FUNDING	<ul style="list-style-type: none"> <li>→ Have we considered – and addressed – any funding concerns which participants may have about a collaboration or merger? These may include matters of competition for the same funding source or a risk of losing support of a funder. <input type="checkbox"/></li> <li>→ Do we need to brief funders about the idea? <input type="checkbox"/></li> </ul>
RESOURCES	<ul style="list-style-type: none"> <li>→ Have we got all the resources (internal and external) we need to make the idea happen? <input type="checkbox"/></li> <li>→ What staff support – including for the project leader – might be necessary? Things may become complex and potentially stressful at some points. Include costs for this in your application. <input type="checkbox"/></li> <li>→ Will we need an external facilitator at any point? What skills and knowledge will they need? What do we expect from them? Have we included their costs in our WTMF application? <input type="checkbox"/></li> </ul>