READY TO **COLLABORATE**?

These tips can help.

If your non-for-profit organisation is entering a collaboration, exploring a new idea or merging with another organisation, these suggestions can help guide you through the collaboration process.

Recipients of Working Together More Fund grants have shared experiences of their collaborations which are the basis for this checklist— "front-line" tips to consider in your own collaboration.

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 FOR SUCCESS

→ Organise meetings - if meetings lack preparation, or quality facilitation, frustrations can grow and confidence in the project might be lost. ☐

→ Are meetings set up well in advance to reduce the number of apologies/absentees? ☐

→ Have we identified cultural (both ethnic and organisational) differences and commonalities, and discussed these openly and fully? ☐

→ Planning the project culture – are we taking care that hierarchy doesn't stifle creative thinking and input by ensuring all views are respected? Have we set "ground rules" to ensure this? Young people often don't see barriers as a problem – are we encouraging their enthusiastic contribution? ☐

→ Confirm we have clearly set and agreed on an overall purpose, expectations, goals and processes. Is everyone *totally* comfortable with these? ☐

→ Are project tasks realistic for everyone? Watch the "willing ones" don't get overloaded and put at risk the achievement of key project milestones. Plan tasks by agreeing and sharing responsibilities – and then communicate progress. This reduces the risk of missing deadlines allowing us to work within the resources and capabilities of participating organisations. ☐

→ As we progress, retain our focus by "parking" any unexpected issues that can be addressed later – exploring these can form part of our regular review meetings. Issues might include training needs, staff turnover, new or revised documentation etc ☐

→ Are we agreed on having regular reviews of timing and requirements? Remember— time is a BIG one! Collaboration always takes longer than expected – are we being realistic about the time the project will take? ☐

→ Let's remember "squares" are to be got out of! Thinking creatively enhances project outcomes. Consider using principles such as Edward de Bono's Six Thinking Hats to view varied perspectives. Find out more about Edward de Bono's Six Thinking Hats here. ☐

→ Are we placing our partner organisations values first in our thinking? This can encourage flexibility, maximise participation and goodwill - plus help ensure equality of power. ☐

→ Sometimes conflict is inevitable – to help mitigate any controversy, have we identified "common ground"? This may provide a firm starting point. Discussing the common ground with everyone – in detail – may reduce risks of disagreements or overcome them before they happen. Giving plenty of time to this may be a key for ultimate success. ☐

PLANNING FOR SUCCESS *cont.*	→ What plans have we to keep good records as we progress? Do we need a collaborative tool such as [Trello (a free collaborative online tool to track task progress)](#)? What about DropBox or OneDrive to share documentation? ☐
	→ Good record keeping will help avoid misunderstandings. What documentation will be needed – e.g. minutes of meetings, a Memorandum of Understanding, newsletters etc. Who is/will be responsible for these? ☐
	→ A Memorandum of Understanding to document what all parties have agreed to can be very helpful when (often unexpected) staff changes occur during the process. ☐
	→ Have we a contingency plan – just in case the "base" plan doesn't work? ☐
	→ It can be challenging to keep the project "moving forward" while still delivering existing services. Are we ensuring those delivering our ongoing services don't get left behind and are being supported? ☐
CULTURE & MOMENTUM	→ Feeding momentum - what actions have we planned to ensure the project remains front of mind to avoid it getting lost in day-to-day operations? How will we retain commitment and interest from participants? People often respond to incentives and this can help lift morale – have we some in mind? ☐
	→ We will need to be careful not to get bogged down in details. These may need to be set aside and sorted when the time is right. ☐
	→ Are different values emerging during the process? Do we need to pause and discuss what's happening? ☐
	→ Have we allowed for reviews of the leadership of the collaboration? Is power being shared? Are the leaders coping? Is leadership rotation worth considering? ☐
	→ What will we do to celebrate successes along the way? Are we having some fun? Let's allow the process we are following to generate excitement and enthusiasm! ☐
GET IN YOUR HELICOPTER OCCASIONALLY	→ Plan for pauses – lots of action-based meetings are excellent for churning through the necessary tasks, but ensuring we review our overall project direction, helps us remain on target and goal-aligned, dealing with any blocks that arise. This requires higher-level reflection of progress at a session that is separate to operational elements - so we get the outcomes we want. ☐
	→ Are we open to changes in the focus of our project as it proceeds? Original ideas for the collaboration/merger may dramatically alter as we explore the issues and our knowledge increases. ☐
	→ If using a facilitator, how well is this working? Do we need to address any concerns? ☐
OUR ORGANISATIONS	→ Are participants all agreed on a common vision for the project? ☐
	→ Are we keeping focused on the ultimate goal/vision? Having some identified "success criteria" may help measure progress. ☐
	→ Are we regularly checking all stakeholders are still on board with the direction we are following? ☐
	→ Have we identified all project stakeholders? Even those not directly involved in our project. Who do we need to keep updated on progress? Have we included the people our service exists for – our "clients"? ☐
	→ Are we moving at a pace that keeps everyone engaged? Like a good waltz it can't be too fast, but not too slow either! ☐
	→ Are we flexible? ☐
	→ Do we allow mistakes and failures to become blame-free learning opportunities? ☐
	→ Are we looking out for – and resolving – any issues around "patch protection"? ☐

COMMUNICATION	→ How will we allow opportunities for people to mix and talk informally?	☐
	→ Let's "listen, listen, listen" – to all involved! Everyone can make a contribution. Is talking drowning out listening? Are all worthwhile ideas being considered and included in the process?	☐
	→ Are we genuinely open and prepared for some "hard discussions"? Do we remember the principle of going hard on the problem and easy on the people?	☐
	→ Let's help and support those who struggle with change. Showing we care and are listening may encourage them to come aboard. They may well become our best champions as things progress. However, if their reluctance threatens our process we may need to deal with it firmly and fairly.	☐
	→ While communication is the key, people may only hear what they want to or their perspectives allow. We may need to explore different ways of getting messages across - use a variety of communication mediums and ensure adequate and regular opportunities for a two-way conversation are available. This will help with clarity and accuracy of messages and enable us to hear valuable feedback.	☐
PEOPLE	→ Have we identified individual and team skills or knowledge gaps - or just assumed they don't exist?	☐
SKILLS	→ Learning motivates - are we sharing skills and knowledge between our people?	☐
KNOWLEDGE	→ Are we keeping relationships at the front of the process? This will build trust and make problem solving much easier.	☐
FUNDING	→ Have we explored how our Working Together More Fund grant might provide leverage to access additional funds?	☐
	→ As our project progresses, are we considering if we're heading in a financially sustainable direction? What will happen to our idea when WTMF funding is no longer available?	☐
	→ Let's be open with partners about "competitive funding" concerns that may undermine their real commitment. Is there potential to work on fundraising together? Do we need to update our funders?	☐
RESOURCES	→ Collaboration requires expertise and external advice may be necessary. Do we need to consider this? Have we considered and gathered the necessary resources — people, funding, tools?	☐
	→ Complexity and self-interest of some stakeholders can leave the project leader stressed and isolated. Check regularly what personal support they need?	☐
	→ Have we checked out useful resources to assist our collaboration/merger? Including WTMF's website.	☐
	→ Technology can increase efficient use of time — for instance, remote online meetings. This needs to be balanced by considering when it's necessary to meet face to face.	☐

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