

# A Collaboration Checklist: 10 Questions for Success

Use this checklist to keep your collaboration on track.

By Ben Tanzer

**Y**ou know that funders and donors expect you to collaborate. And you know there are great benefits to collaboration, ranging from increased access to information, tools, and resources to enhanced efficiency and effectiveness.

Much as you believe in collaboration, however, it's hard. You find yourself struggling more than you should.

Why? Because you rarely slow down long enough to ask yourself what makes a collaboration succeed.

To assure a successful collaboration, ask yourself these questions:

## 1. What Can You Learn from the Past?

- **What can you find out about your co-collaborators? How have they acted** in previous collaborations? Were they easy to work with? Your co-workers and peers can provide insight and help you prepare for the collaboration. The more you learn beforehand about other members of the collaboration, the more successful you will be.

- **Has this type of collaboration** been pursued before? If so, what can you learn from that experience? What were the successes, and how were they achieved? What were the failures, and how can you avoid repeating them? This last question is especially important when you want to engage individuals or organizations previously involved in a similar effort that failed. They will want to know how things are going to be different this time, and you must be able to tell them.

## 2. What Is the Climate Like?

- **How supportive** is the environment? Say you want to build a drug treatment center in a residential neighborhood. Do you know whether the stakeholders

in the community — including people who work in nonprofits, those in the business community, and those who live in the area — support collaborations in general and this effort specifically?

- **Do you have the political and economic resources** needed to support this effort?

- **What are the logistics** of getting together with other members of the collaboration? Is there a place in the community where you can meet if needed? Is it comfortable and accessible? Are there places to park? Are there impediments that may keep some people from coming to the meetings?

## 3. How Well Are You Communicating?

- **Do you use** a variety of different communication channels, including Web sites, online bulletin boards, listservs, and intranets?

- **Are you prepared** to take people to lunch to sound them out about how the collaboration is progressing?

- **Is communication between members** open, honest, and respectful?

- **Are calls** returned promptly?

- **Do you have** good communication both within your organization and between your organization and others in the collaboration?

## 4. What Do You Want to Gain?

- **How does your organization** want to benefit from the collaboration? Have you shared that information with your fellow collaborators so they are clear about why you're participating?

- **Do you know** what other participants hope to achieve so that you can address their needs?

## 5. Is Leadership in Place?

- **Have you designated someone** to take charge? Is someone ready to organize meetings and remind

people to fulfill the tasks they've agreed on? When things get bogged down, is someone prepared to step forward and challenge participants to make a decision?

- **Have you pinpointed allies** in the community and at your organization who are willing to tackle obstacles, bureaucracy, and red tape on your behalf?

## 6. Are You Prepared to Combat Impatience?

- **Have you accepted the fact** that building consensus, acquiring funding, and obtaining organizational and community support for the collaboration takes time?

- **Have you identified** which outcomes will be short-term and which will be long-term? Are you ready to build early successes into your efforts?

- **Do you forge camaraderie** and a sense of accomplishment by celebrating successes as they happen?

## 7. How Effective Are Your Meetings?

- **Have you chosen someone** to facilitate every meeting? This doesn't have to be the same person every time, but you must identify a facilitator who will move things along and guide the discussion.

- **Is the meeting agenda** planned and shared with participants in advance?

- **Do meetings start and end** on time?

## 8. Are You in Sync?

- **Do you and other members of the collaboration** share the same vision? Do you have common goals for pursuing that vision?

- **Does everyone agree** on where the collaboration is going and how to get there?

- **Have you made sure** that everyone involved in the collaboration shares a common language and understanding of terms? Have you defined the meaning of acronyms and buzzwords? Are you careful not to assume that everyone has the same idea of what collaboration and facilitation mean?

## 9. Are the Right People Included?

- **Are the key players and decision-makers** in the community — regardless of organizational affiliation — at the table? Have you taken the time to brainstorm who they might be?

- **Have you included staff** from different levels of all the participating organizations?

- **Are consumers of the services** included in the collaboration?

- **Might there be too many people** at the table? What feels manageable to this group?

- **Most important, have you included representatives** from the groups, communities, and organizations who stand to be most profoundly affected by this effort?

## 10. Are You Taking Full Advantage of Formal Tools?

- **Do you have a written agreement**, laying out expectations for participation? Have all participating organizations approved and signed this agreement?

# Collaboration Mystery Revealed

If you're a collaboration coordinator and your boss or partners refer to your work as "that special project" or "your project," then they aren't seeing your role or their own role correctly. Collaboration is *not* a "project." It is a strategy for changing the way partners do business. You are not coordinating a special project. You are relieving people of some of the daily chores of collaboration so they can have more time to make changes inside their organizations.

—From *The Nimble Collaboration*, Wilder Foundation, [www.wilder.org](http://www.wilder.org)

- **Have you created ground rules** everyone can agree to, such as the importance of being on time for meetings? Have you established prohibitions regarding abusive language and behavior? Do you revisit these rules when people break them?

- **Do you make time** for assessment? At the end of meetings and phone calls, do you make a point of asking people how the collaboration is progressing? Do you plan formal assessments once or twice a year to evaluate progress?

Revisit these questions often to be sure you're on course. Share them with other members of the collaboration. If you ask the right questions — and commit yourself to the right answers — your collaboration will be on its way to success. ■

### Resources

Campbell, David, "High-End Strategic Alliances as Fundraising Opportunities," *Nonprofit World*, Vol. 19, No. 5.

Gale, Eddie, "Banking on Collaboration," *Nonprofit World*, Vol. 19, No. 2.

Morton, Gene, "Working Together: Developing Collaboration among Competing Organizations," *Nonprofit World*, Vol. 5, No. 1.

Muehreke, Jill, "Nonprofit Education Is Coming to Your Town: A Study in Collaborative Leadership," *Nonprofit World*, Vol. 19, No. 2.

Remley, Dirk, "Pool Resources for Success," *Nonprofit World*, Vol. 16, No. 5.

Sturm, Paul, "Seven Rules of Successful Collaboration," *Nonprofit World*, Vol. 18, No. 2.

Tietler, Maxine, "Alliances Are Not Mergers: What Problems Should You Expect?," *Nonprofit World*, Vol. 17, No. 2.

*These resources are available at [www.snpo.org/members](http://www.snpo.org/members). Also see Learning Institute programs on-line: [Strategic Alliances \(www.snpo.org/li\)](http://StrategicAlliances(www.snpo.org/li).*

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