

HOW WELL PREPARED ARE WE TO COLLABORATE OR MERGE?

This checklist is based on feedback from recipients of Working Together More Fund grants who have been involved in a collaboration project or merger. It is therefore a “front-line” set of considerations you might like to work through alone, with your team or your trustees when thinking about collaborating or merging. After you decide to proceed, see the ‘Tips When Collaborating or Merging’ checklist to help you get started.

Your own experiences will be invaluable in continuing to develop this checklist. Please pass on any learnings to Bede Martin (bedemartin@xtra.co.nz). We are also keen to hear if this checklist was helpful and how we could 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 “blinker” thinking
- What is driving the idea behind our project? Better service? Expanded services? Greater efficiencies? It helps if everyone knows and agrees with the purpose.
- Have we a shared, over-arching goal or vision? This can help overcome obstacles along the way and keep everyone focused.
- A Memorandum of Understanding (MoU) can assist when unexpected staff changes occur during your project by clarifying the process, roles and relationships of all partner organisations. How will we manage any unexpected staff changes?
- How will we start the project process? Is a “big gathering” a good way to bring people together, get them on board and motivate? The start is a good time to reduce any apprehensions that may later lead to blockages.
- Is it appropriate to break tasks into distinct stages e.g. exploration, consultation, implementation? This can assist when approaching the WTMF as often one stage will lead to changes in those that follow – along with changes to budgets.
- Which agency and person 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 identified all relevant stakeholders?
- 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 they will communicate during the process and make 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?
- 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"> → Have we given thought to the need to consult, plan, communicate? <input type="checkbox"/> → Are we clear and explicit about what each organisation wants to achieve? <input type="checkbox"/> → How will we manage internal and/or external conflicts if or when they arise? <input type="checkbox"/> → Are all our boards, managers and staff involved, aware of and – ideally – supportive of what is being considered or planned? If not, how will this be resolved? <input type="checkbox"/> 	
PEOPLE / SKILLS / KNOWLEDGE	<ul style="list-style-type: none"> → 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"/> → Are we aware of any “ego” or “ownership” issues that might block progress – including my own? <input type="checkbox"/> → What incentives have we got to motivate people? Such as celebrations to mark key achievements such as time off, gifts etc <input type="checkbox"/> → What expertise do we and our partners have “in-house”? Go beyond skills associated with roles to other attributes they could bring. <input type="checkbox"/> → Do we need training or external guidance to support our collaboration/merger? <input type="checkbox"/> 	
TIME	<ul style="list-style-type: none"> → Have we the time to see this idea through to completion? <input type="checkbox"/> → How realistic is what we are hoping to achieve? <input type="checkbox"/> → What are the obvious barriers we may strike and how might we overcome these? <input type="checkbox"/> → How will our (always busy and usually unpaid) board members be able to commit time to build relationships and be involved in the process? <input type="checkbox"/> 	
FUNDING	<ul style="list-style-type: none"> → 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"/> → Do we need to brief funders about the idea? <input type="checkbox"/> 	
RESOURCES	<ul style="list-style-type: none"> → Have we got all the resources (internal and external) we need to make the idea happen? <input type="checkbox"/> → What staff support – including that for the project leader – might be necessary? Things may become complex and potentially stressful at some points. Include the cost of this in your application. <input type="checkbox"/> → 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"/> 	