

# READY TO COLLABORATE?

*These tips can help.*

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

Recipients of grants from the Working Together More Fund have shared experiences of their collaborative projects which act as the basis for this checklist. So it's a set of "front-line" tips to consider when carrying out your own collaboration.

*Your own experiences will be invaluable in continuing to develop this list for the benefit of others - so please share any learnings by emailing [bedemartin@xtra.co.nz](mailto:bedemartin@xtra.co.nz). Also let us know if this checklist was helpful and how we could increase its usefulness.*

## PLANNING FOR SUCCESS

- Organise your 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 from some 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?
- Are project tasks realistic for everyone? Watch that "willing ones" don't get overloaded risking the achievement of key project milestones. Planning tasks by agreeing and sharing responsibilities – and then using a mechanism for communicating progress - reduces the risk of missing deadlines and allows us to work within the resources and capabilities of participating organisations.
- As we progress, retain our focus by "parking" any unexpected issues that are able to be addressed at a later date – exploring these can form part of our 'pit-stop' meetings. They might include training needs, staff turnover, new or revised documentation and so on.
- Let's remember "squares" are to be got out of! Thinking creatively consistently 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 partner organisations values first in our thinking? This can encourage flexibility and maximise participant contribution and goodwill .
- Sometimes conflict is inevitable – to help mitigate any controversy, have we identified "common ground" before starting? This may provide a firm starting point. Discussion of the common ground by all – in detail – may reduce risks of disagreement or even overcome them before they happen. Giving plenty of time to this may be a key for ultimate success.

<p><b>PLANNING FOR SUCCESS</b> <i>cont.</i></p>	<ul style="list-style-type: none"> <li>→ Collaboration always takes longer than expected – are we being realistic about the time the project will take?</li> <li>→ What plans have we to keep good records as we progress? Do we need a collaborative tool such as <a href="#">Trello (a free collaborative tool to track task progress)</a>? 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?</li> <li>→ 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.</li> <li>→ Have we a contingency plan – just in case the “base” plan doesn’t work?</li> <li>→ 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?</li> </ul>	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>
<p><b>CULTURE &amp; MOMENTUM</b></p>	<ul style="list-style-type: none"> <li>→ 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?</li> <li>→ 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.</li> <li>→ People often respond to incentives and this can help lift morale – have we some in mind?</li> <li>→ What will we do to celebrate successes along the way? Are we having some fun? Let’s allow the process we are following generate excitement and enthusiasm!</li> </ul>	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>
<p><b>GET IN YOUR HELICOPTER OCCASIONALLY</b></p>	<ul style="list-style-type: none"> <li>→ Plan for pit stops – 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 point and goal-aligned. This requires higher-level reflection of progress at a session that is separate to operational components so we get the outcomes we want.</li> <li>→ Are we open to changes in the focus of our project as it proceeds? Original ideas for collaboration/merging may dramatically alter as we explore the issues and knowledge increases.</li> </ul>	<input type="checkbox"/>  <input type="checkbox"/>
<p><b>OUR ORGANISATIONS</b></p>	<ul style="list-style-type: none"> <li>→ Are participants all agreed to a common vision for the project?</li> <li>→ Are we keeping focused on the ultimate goal/vision? Having some identified “success criteria” may help measure progress.</li> <li>→ 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”?</li> <li>→ 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!</li> <li>→ Are we flexible?</li> <li>→ Do we allow mistakes and failures to become blame-free learning opportunities?</li> <li>→ Are we looking out for – and resolving – any issues around “patch protection”?</li> </ul>	<input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>  <input type="checkbox"/>

COMMUNICATION	<ul style="list-style-type: none"> <li>→ How will we allow opportunities for people to mix and talk informally? <input type="checkbox"/></li> <li>→ Let's "listen, listen, listen" – to all involved! Everyone can make a contribution. <input type="checkbox"/></li> <li>→ Are we genuinely open and prepared for some "hard discussions"? Do we remember the "rule" to go hard on the problem and easy on the people? <input type="checkbox"/></li> <li>→ 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. If however their reluctance threatens our process we need to deal with it firmly and fairly. <input type="checkbox"/></li> <li>→ While communication is the key, people may only hear what they want to or their perspective allows. 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. <input type="checkbox"/></li> </ul>	
PEOPLE SKILLS KNOWLEDGE	<ul style="list-style-type: none"> <li>→ Have we identified individual and team skills or knowledge gaps - or just assumed they don't exist? <input type="checkbox"/></li> <li>→ Learning motivates - are we sharing skills and knowledge between our people? <input type="checkbox"/></li> <li>→ Are we keeping relationships at the front of the process? This will build trust and make problem solving much easier. <input type="checkbox"/></li> </ul>	
FUNDING	<ul style="list-style-type: none"> <li>→ Have we explored how our Working Together More Fund grant might provide leverage to access additional funds? <input type="checkbox"/></li> <li>→ 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? <input type="checkbox"/></li> <li>→ Let's be open with partners about "competitive funding" concerns that may undermine their real commitment. <input type="checkbox"/></li> </ul>	
RESOURCES	<ul style="list-style-type: none"> <li>→ Collaboration requires expertise and external advice may be necessary. Do we need to consider this? <input type="checkbox"/></li> <li>→ Complexity and self-interest of some stakeholders can leave the project leader stressed and isolated. Check regularly what personal support they need? <input type="checkbox"/></li> <li>→ Have we checked out useful resources to assist our collaboration/merger? <a href="#">Including WTMF's website</a>. <input type="checkbox"/></li> <li>→ Technology can increase efficient use of time - when appropriate. Are we also considering when it is better to meet face to face? <input type="checkbox"/></li> </ul>	