

Steps in Pursuing a Collaboration



ASSESSING the POTENTIAL

- Compile and analyze all relevant information about the programs, staffing, assets, liabilities, and budgets of the interested organizations.
- Conduct interviews with members of the staffs, boards, and external stakeholders to determine their perspective on the pros and cons of a possible collaboration.
- Prepare a written assessment, identifying advantages and disadvantages of a possible collaboration and recommending a process and a timeline for pursuing the collaboration.
- Review these findings with the staffs and boards of the interested organizations.
- **Secure a go/no-go decision from each board of directors.**

PROPOSING a STRUCTURE

- Establish a Collaboration Committee via a formal resolution by each board, assigning staff and board representatives from each of the organizations considering collaboration.
- Provide a "data book" for each member of the Committee. It will initially contain only the assessment, but will eventually include all of the information generated by and for the Collaboration Committee, including a record of its decisions and recommendations.
- Develop a strategic analysis of the organizational "fit" between/among the organizations, noting similarities, differences, obstacles, and issues.
- Develop a strategic analysis of the **function** of the collaboration, examining in particular which programs might be added (or cut) and whether the service area should be expanded (or shrunk).
- Evaluate the pros and cons of various **forms** a collaboration could take. Once a corporate form is selected, develop a general scenario for funding, programming, and staffing.
- Negotiate tentative solutions to the "obstacles and issues" dividing the organizations.
- Present a proposed collaboration plan to the boards of the participating organizations (possibly meeting with external funders and stakeholder to "test" their reaction to the proposed plan).
- **Secure a go/no-go decision from each board of directors**, approving, revising, or rejecting the proposed collaboration plan.

PLANNING for IMPLEMENTATION

- Secure renewed authorization from each board for the Collaboration Committee to negotiate the final terms and conditions of an agreement between/among the organizations, based upon the Committee's proposed plan as accepted or revised.
- Develop a list of tasks and a reasonable timeline for completing the collaboration.
- Develop a budget and a staffing plan for the planned collaboration, including an analysis of extra costs and potential savings arising out of the collaboration.
- Negotiate a Collaboration Agreement (which, at the consolidation end of the collaboration continuum, is a "Merger Agreement").
- Prepare amendments to corporate bylaws, if necessary.
- Secure approvals from funders – and, if necessary, from the organizations' members.
- **Secure final approval from the boards** of all organizations that are joining the collaboration.