A Guide to Successful Collaboration

Individual Goal Setting

Consider the following questions:

- Why are we doing what we are doing?
- What are we hoping to achieve with this project?
- What challenges/obstacles does this project look to overcome?
- What do we want the long-term effects of this event/program to be?

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Before the development of any new project, take some time to think about why you are embarking on this new project and what you are hoping to accomplish.

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It is important to have a clear understanding of your own goals before looking for others to collaborate with you.

Pro Tip: From these questions, develop a statement that encompasses your overall goals, highlighting the "why" of your event/program.

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Partnership Search

Consider the following questions:

- What is the mission of this organization?
- Does it align with mine?
- Do we share similar values?
- Does this partnership bring up any conflict of interest? If so, what does that look like and how may it negatively affect our ability to work successfully together?
- Do I enjoy working with this person/people?
- If I don't have trust developed with them already, can I see it developing?

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Once you have a clear vision of what you'd like your project to achieve, begin having conversations with prospective partners, and be sure to be honest and true to yourself, your organization, and your project goals in doing so.

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Some partners may be great, but not quite the right fit for this particular project, and that's okay! Some partners may seem like a great fit for this project, but their overall mission may conflict with yours. Some partners may seem like an unlikely fit but share similar values and goals.

Pro Tip: Be sure to keep an open mind and stay true to your own mission and goals.

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Collective Goal Setting
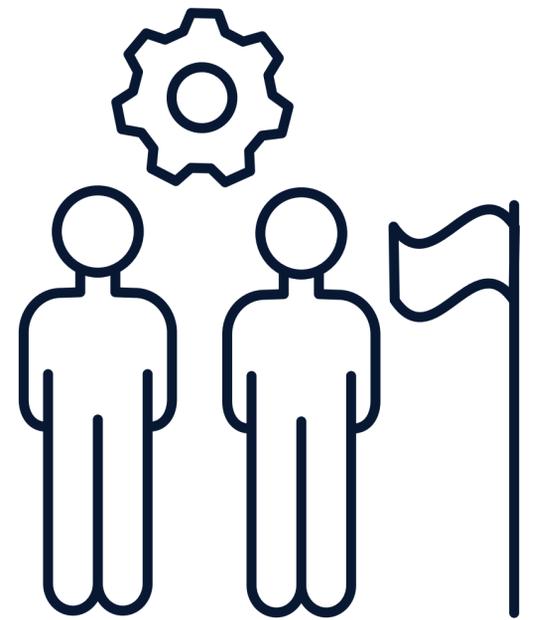
Consider the following questions:

- What are the short, medium, and long-term goals of this project?
- In what time frame do we want to establish our goals?
- What do we need to measure in order to understand if we have achieved your goals?
- How will we know that we were successful in achieving our goals? How will we know if we were not successful?
- What do we want to create/change/celebrate/etc. with the completion of our project?

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Now that you have found one or more partners who you believe to be a good fit, work together to flush out the detailed goals of your project.

It is helpful to think of SMART goals here:
Specific
Measurable
Attainable
Relevant
Timely

Pro Tip: Start by sharing your individual goals, and then together build goals that encompass what all partners are looking to achieve.

A Guide to Successful Collaboration

Identifying Strengths and Challenges

Consider the following questions:

- Where do our strengths and resources overlap and where do they differ? Where can one partners challenge(s) be compensated for by another's strength(s)?
- How can we utilize our different networks/resources in order to ensure the success of our project?
- Are there any gaps in our strengths/experiences/skills? If so, are there others we can bring in to help fill these gaps?
- How can we best utilize our own strengths/skills/experiences throughout this project?

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Each person/organization involved in this partnership brings their own experiences, strengths, skills, networks, etc. to the project.

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Once all partners have done this exercise on their own, come together to share your notes.

Pro Tip: Take some time to ask yourself what strengths, skills, and experience you bring to this project. Then zoom out and think about what your organization brings to this project and partnership.

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Roles and Responsibilities

Consider the following questions:

- What are the concrete action items that need to take place in order for your project to be successful?
- What are the skills/resources needed to successfully complete each task?
- Who will be responsible for doing what?
- What deliverable(s) is each person expected to produce?
- What happens once someone has completed their task? How will the rest of the group be kept up to date?
- Do deliverables need to be reviewed by others before moving on to the next step?

You now have an understanding of what each partner can bring to your collaboration. Now is the time to divide up the roles and responsibilities of the project.
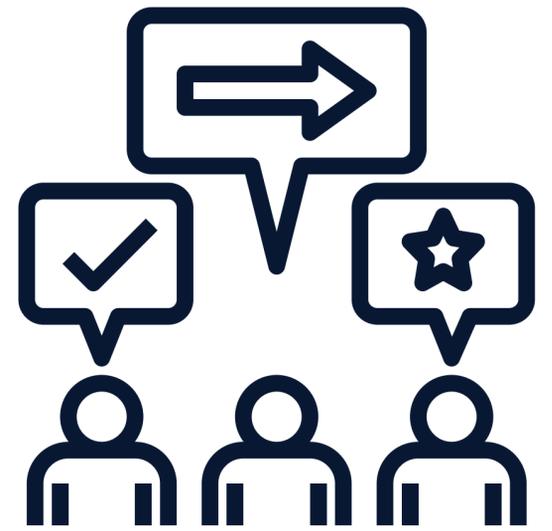
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Take time to write down clear roles and responsibilities of each person/organization involved in this collaboration.

Pro Tip: It is important here to create concrete outlines of what is expected from each partner.

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Establishment of Working Norms

Consider the following questions:

- How often will your team meet? How long will these meetings be?
- When you do meet, will it be in person? Over the phone? On Zoom?
- When you communicate with one another, do you have to involve everyone in the partnership, or just the people it concerns?
- Do people prefer to communicate regularly over the phone, text message, email?
- How do we ensure accountability of roles and tasks?
- What happens if someone doesn't complete a task within the timeframe established?

Ensure a smooth working relationship by taking time to establish some working norms. How will you work together as you move forward with this project?

Pro Tip: Jot down the answers to the questions above to ensure that everyone is on the same page.

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Timeline
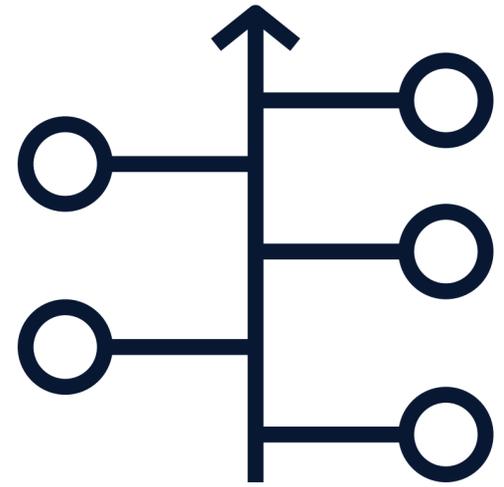
Consider the following questions:

- Are all partners clear on the timeline of your project?
- Are all partners clear on each individual task at hand as well as the order in which each task should be completed?

Work together to create a realistic timeline that takes into consideration other roles and responsibilities (ie. your day-to-day work, family, etc.).

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It is important to go over each step of the project and set deadlines for when it needs to be finished/accomplished by.

Pro Tip: Consider using a shared document to keep everyone on track and check off tasks as they are completed.

A Guide to Successful Collaboration

Evaluation of Project Success

Consider the following questions:

- What goals were successfully achieved?
- What challenges/obstacles did we encounter in achieving the goals of our project?
- How successfully did we collaborate? Where/how can we work together again in the future?
- How did this project further the overall mission of each partner?

Once the project is completed, it is imperative that all partners take the time to evaluate the project.

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Were you successful in achieving your goals? If so, how do you know? If not, what can you change to help ensure future success?

Pro Tip: Create a brief final report of the success and limitation of the project written and signed by all partners.