### The Strategic Why:

What is the challenge for which collaboration may be a potential solution?

• Strategic challenge

How would collaboration lead to improved outcomes for your organization?

Your Strategic Why

#### Goals of collaboration

Overall goals

- First level bullet
  - Second level dash
    - Third level arrow

#### For your organization

For the sector

What challenges will collaboration address?

- First level bullet
  - Second level dash
    - Third level arrow

- First level bullet
  - Second level dash
    - Third level arrow

How would this lead to improved outcomes?

- First level bullet
  - Second level dash
    - Third level arrow

- First level bullet
  - Second level dash
    - Third level arrow

### Who should participate in this collaboration?

Overall goals of collaboration

- First level bullet
  - Second level dash
    - Third level arrow

What services/ resources are needed?	Who should provide this service?	What resources/expertise should they bring?

### What elements are necessary for this collaboration to be a success?

What we know

What we don't know

• TBS

TBD

For each potential partner, you should conduct an initial due diligence from the outside - what are potential strengths, risks and friction?

#### Strategy, business model and brand

#### **Financial** performance and health

#### Leadership and organizational culture

- What benefits does this
   What is the financial potential partner's strategy, business model or brand offer?
- Does the potential partner have effective outcomes and/or efficient operations?
- health and history of this organization?
- What are the financial benefits/risks of aligning with this organization?
- What do we know about the leadership of this organization?
- Is the culture of the organization wellaligned to ours?

# What do we care about? Sample detailed due diligence questions (1 of 2)

unigetice questions (1 of 2)							
Strategy, business model and brand							
	Intended Impact		Theory of Change				
	Beneficiaries	Outcomes	Models of service	Programs	Brand		
Questions to ask	<ul> <li>Who are the target beneficiaries of the partner organization?</li> </ul>	<ul> <li>What outcomes does the partner organization hold itself accountable for?</li> <li>Does the partner organization have evidence of success?</li> </ul>	<ul> <li>How does the partner organization deliver services?</li> <li>How does it differ from our approach?</li> </ul>	<ul> <li>What are the partner organization's key programs?</li> <li>How would a collaboration support or undermine programs?</li> </ul>	<ul> <li>What is the partner organization's brand?</li> <li>Will it enhance reputation, recognition, marketability of our organization?</li> </ul>		
sources to answer questions	<ul> <li>Peer organizations</li> <li>Knowledgeable stakeholders</li> <li>Organization website</li> </ul>	<ul> <li>Organization website</li> <li>Knowledgeable stakeholders (e.g., United Way)</li> </ul>	<ul> <li>Peer organizations</li> <li>Knowledgeable stakeholders</li> <li>Organization website</li> </ul>	<ul> <li>Peer organizations</li> <li>Knowledgeable stakeholders</li> <li>Organization website</li> </ul>	<ul> <li>Peer organizations</li> <li>Funding community</li> <li>Knowledgeable stakeholders</li> </ul>		

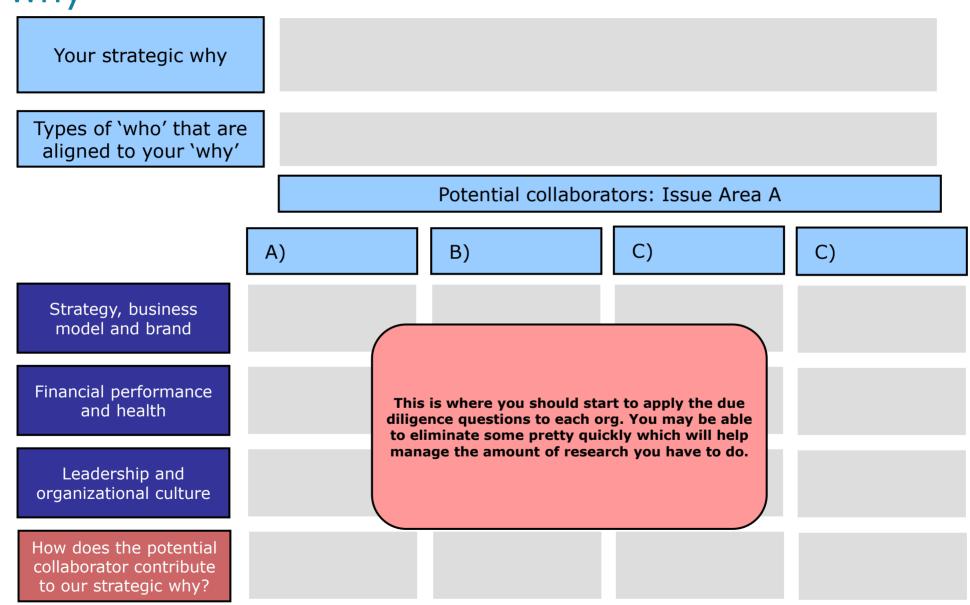
### What do we care about? Sample detailed due diligence questions (2 of 2)

Financial performance/health Leadership and organizational culture **Funding model Cost model** Leadership **Culture Board Questions** • What are the What financial • Who is on the Who are the What is the to ask commitments leadership team key board culture of the partner and risks does and what do we members and organization's partner main funding the partner know about will they organization? sources? organization them? support a Do staff share collaboration? have? - How reliable What roles common do they - Outstanding would the working values? seem? debt? partner What is the - Contracts/ organization's leases? funding leadership play history/trends What is the in a of the partner partner collaboration? organization? organization's cash position? **Potential**  Annual reports Annual reports Knowledgeable Knowledgeable Knowledgeable stakeholders stakeholders stakeholders sources Organization Organization to answer website website Peer Peer Peer questions organizations organizations organizations Guidestar Knowledgeable (Form 990s) stakeholders Your board Your board Your board Knowledgeable

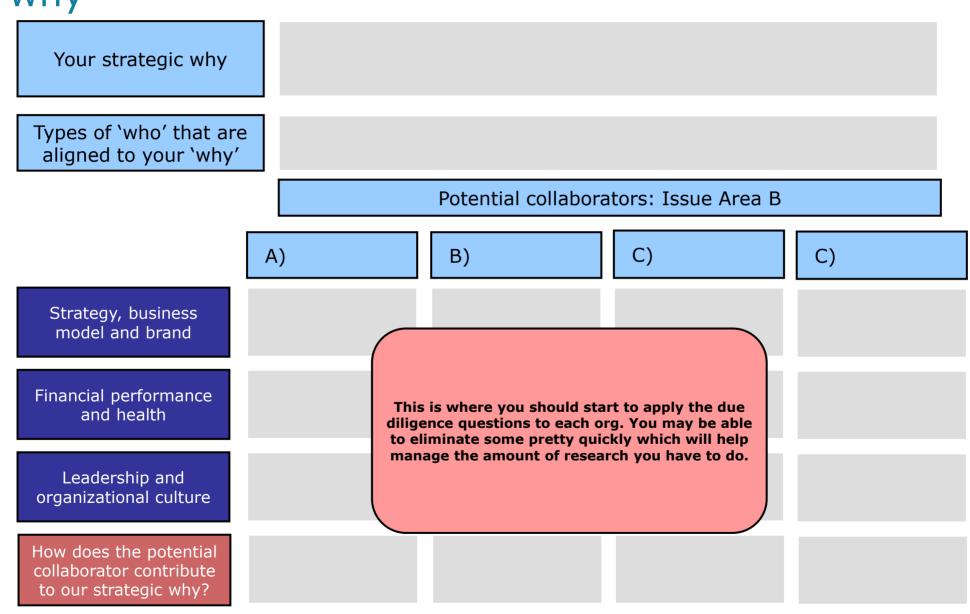
Note: Not every question will apply to an individual organization's situation

stakeholders

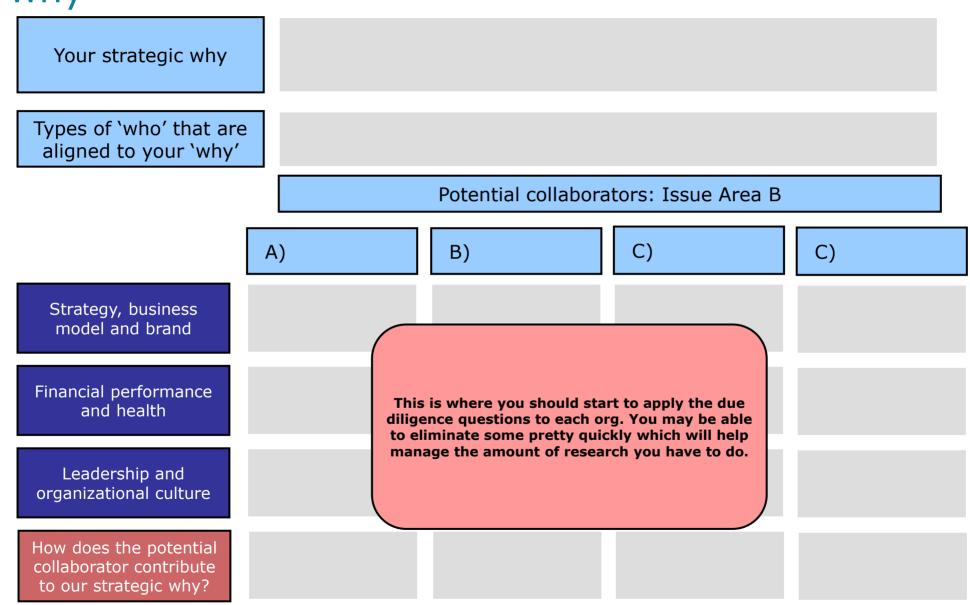
# Determining the 'who' to match the 'strategic why'



# Determining the 'who' to match the 'strategic why'



# Determining the 'who' to match the 'strategic why'



### **Collaboration rationale**: Potential partners

