

Collaboration Rationale and Design

What is the proposed collaboration?

Basic proposal

- Who is the other party?
- What are their mission and core services/programs?
- What's the core business case for the collaboration (i.e. the elevator pitch)?
- What's the current status of the discussions?

Is this a good fit for us?

Key decisions

- Does the collaboration further our strategic plan?
- Is the collaboration executable given our resources and other commitments?
- What is the impact of the collaboration on our relationships with other parties?
- What is the impact of the collaboration on our capacity for other similar relationships?

Strategic fit: expanding impact and reach

- How does this collaboration affect our existing client and partnership relationships?
- Will this collaboration help us to deliver services we can't or don't today?
- Will this collaboration help us to enter into new geographical areas?
- Will this collaboration help us to engage with other potential clients or partners we can't or don't today?

Collaboration footprint

- Will this collaboration preclude us in any way from providing services in the same region?
- Are any clients to be served through the collaboration already working with us? How will this collaboration affect those relationships?
- How will this collaboration affect our funding?
- Will the collaboration limit us from partnering with other organizations (that may or may not be competitors of the partner)? Will this foreclose us from other opportunities?
- Will either of us have any involvement with governance of the other, such as having a representative on the other's board?
- Are there other impacts or implications of the collaboration we should be thinking about?

Is this the right partner?

Partner information

- What geographic regions do they serve?
- Have we worked with them before? If so, how did it go?
- Are there any reputational risks from working with them?
- What's their motivation for working with us? Is there an obvious benefit for them?
- Does it seem like there will be a good fit between our cultures and management styles?
- Does the partner have a proven track record with significant funders? Are there any overlaps with our funders that could be problematic?
- What are the partner's annual revenues? Are they financially stable?
- Does the partner have the capacity to deliver?
- Have we seen a demonstrable and impressive commitment from the partner (resources devoted to planning, interesting marketing ideas, etc.)?
- Do we work with any similar organizations? Would it make more sense to work with someone else on this?

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- Is the partner associated in any way with any of our directors, major funders or executives? Are there any conflicts of interest we should be aware of?
- Will either we or the partner clearly be able to dictate the terms of this collaboration?

Who does what?

Money

- How does our joint work get funded?
- Will this collaboration offer the opportunity to work with or attract new funding sources?
- Do we jointly approach funders?
- Can this collaboration begin without funding in place?
- If grants are awarded, how will the grant be awarded and used by each party? Will one party receive the grant and then sub-grant to the other party?
- If it's fee-for-service, who has the contract with the client?
- If the partner holds the grant or contract, are we confident in the partner's ability to manage the funding source and ensure timely payment to us?
- Does the financial model appear sustainable over time?

Business development and marketing

- Who is responsible for business development? Will we jointly approach potential clients, or will one have the lead?
- Will the collaboration be separately branded?
- Will our services be co-branded with the partner's name and logo?

External approvals

- Do we need to get the approval of any of our funders, lenders, regulators or other third parties?
- Even if we don't need approval from any third parties, do we need to notify them? Should we?

Intellectual property

- Will this project involve the creation of new content, methods, or materials?
- If new content, methods, or materials are created, who will own what?
- If the content, methods, or materials are jointly owned, should we place limitations on the partner's use?
- If we create something new for or with the partner, can we use it outside of the collaboration, as part of our regular programs or with other partners?
- Will we license our existing content, methods, or materials to the partner? Will they license content, methods, or materials to us?
- How long will the licenses be in place? What other limitations will be imposed on the license? Will we be limited to this project or can we use the licensed material outside of the collaboration?

How will we launch and run the collaboration?

Technology, leadership, staffing, and risk management

- Will we need to implement any new technology or internal systems, or establish new external platforms, to carry out the collaboration?
- Are there any efficiency downsides or security risks associated with our interfaces with the partner's IT and financial systems if any?
- Who is the internal leader of the project?
- What internal staff and other resources do we need to launch and carry out the collaboration? Do we need to hire new staff? Do we need to change anybody's job description?
- Are we committing employees who do not have the necessary bandwidth? Do we need to take anything off anybody's plate?

- Will involvement in this collaboration provide employee-stretch and other development/promotion opportunities?
- How will we communicate this collaboration to our staff? What are likely reactions?
- Will this collaboration require any increase or other changes in our liability or other insurance? (e.g. due to increased time spent at schools)
- Will involvement in the collaboration require us to make any other changes in our risk management practices?

Internal approvals

- Does the Board need to approve the collaboration?
- What information does the Board need before it approves?
- When do we want to go to the Board?

Tax and external reporting

- Do we need to get the approval of or report the collaboration to the IRS?
- What do we need for our auditor in connection with reflecting the collaboration in our financials?

Contracts

- Is there a confidentiality agreement in place with the other party? Should there be?
- What are the necessary documents to get the collaboration done?

How will we evaluate and wind down the collaboration?

Data and evaluation

- What data do we plan to collect and evaluate?
- Who is responsible for data collection? Who owns the data?
- Will we be able to use any data developed in or learned through the collaboration for any purpose?

Collaboration metrics

- What metrics will we use to determine if the collaboration is successful?
- Will the collaboration be structured with milestones, periodic reviews, or other methods for reviewing performance and making decisions about modification or continuation?
- Will each party be required to submit reports to the other? What do we want to know from our partner?
- Will evaluation be done by an outside neutral party?
- Will evaluation be funded separately? How will it be funded?

Duration and termination

- What is the term of the collaboration?
- Can we extend the length of the collaboration or renew if we want to?
- Under what circumstances do we want to be able to terminate the relationship? What's the worst-case scenario here?
- Can we terminate at any time? Can the partner terminate at any time?
- What if the partner breaches its obligations? Do we retain the right to walk away?
- What happens if one of us merges with or is acquired by another organization?
- How significant are the reputational risks if the collaboration doesn't work out?
- Do we need a backup plan in case this relationship fails?

Should we proceed?

Stepping back

- What most excites us about this collaboration?
- What are our biggest worries about this collaboration?
- Does this collaboration feel right?