

# 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

What challenges will collaboration address?

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

For the sector

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

- 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

- TBS

What we don't know

- TBD

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



- What benefits does this potential partner's strategy, business model or brand offer?
- Does the potential partner have effective outcomes and/or efficient operations?
- What is the financial 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 well-aligned to ours?

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

1

## Strategy, business model and brand

### Intended Impact

### Theory of Change

### Brand

#### Beneficiaries

#### Outcomes

#### Models of service

#### Programs

#### Questions to ask

- |   |   |  |   |  |
|---|---|--|---|--|
| <ul style="list-style-type: none"> <li>Who are the target beneficiaries of the partner organization?</li> </ul> | <ul style="list-style-type: none"> <li>What outcomes does the partner organization hold itself accountable for?</li> <li>Does the partner organization have evidence of success?</li> </ul> | <ul style="list-style-type: none"> <li>How does the partner organization deliver services?</li> <li>How does it differ from our approach?</li> </ul> | <ul style="list-style-type: none"> <li>What are the partner organization's key programs?</li> <li>How would a collaboration support or undermine programs?</li> </ul> | <ul style="list-style-type: none"> <li>What is the partner organization's brand?</li> <li>Will it enhance reputation, recognition, marketability of our organization?</li> </ul> |
|---|---|--|---|--|

#### Potential sources to answer questions

- |  |   |  |  |   |
|--|---|--|--|---|
| <ul style="list-style-type: none"> <li>Peer organizations</li> <li>Knowledgeable stakeholders</li> <li>Organization website</li> </ul> | <ul style="list-style-type: none"> <li>Organization website</li> <li>Knowledgeable stakeholders (e.g., United Way)</li> </ul> | <ul style="list-style-type: none"> <li>Peer organizations</li> <li>Knowledgeable stakeholders</li> <li>Organization website</li> </ul> | <ul style="list-style-type: none"> <li>Peer organizations</li> <li>Knowledgeable stakeholders</li> <li>Organization website</li> </ul> | <ul style="list-style-type: none"> <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)

	2 Financial performance/health		3 Leadership and organizational culture		
	Funding model	Cost model	Leadership	Board	Culture
<b>Questions to ask</b>	<ul style="list-style-type: none"> <li>• What are the partner organization's main funding sources?                             <ul style="list-style-type: none"> <li>- How reliable do they seem?</li> </ul> </li> <li>• What is the funding history/trends of the partner organization?</li> </ul>	<ul style="list-style-type: none"> <li>• What financial commitments and risks does the partner organization have?                             <ul style="list-style-type: none"> <li>- Outstanding debt?</li> <li>- Contracts/ leases?</li> </ul> </li> <li>• What is the partner organization's cash position?</li> </ul>	<ul style="list-style-type: none"> <li>• Who is on the leadership team and what do we know about them?</li> <li>• What roles would the partner organization's leadership play in a collaboration?</li> </ul>	<ul style="list-style-type: none"> <li>• Who are the key board members and will they support a collaboration?</li> </ul>	<ul style="list-style-type: none"> <li>• What is the culture of the partner organization?</li> <li>• Do staff share common working values?</li> </ul>
<b>Potential sources to answer questions</b>	<ul style="list-style-type: none"> <li>• Annual reports</li> <li>• Organization website</li> <li>• Guidestar (Form 990s)</li> <li>• Knowledgeable stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>• Annual reports</li> <li>• Organization website</li> <li>• Knowledgeable stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledgeable stakeholders</li> <li>• Peer organizations</li> <li>• Your board</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledgeable stakeholders</li> <li>• Peer organizations</li> <li>• Your board</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledgeable stakeholders</li> <li>• Peer organizations</li> <li>• Your board</li> </ul>

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

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

Your strategic why

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Types of 'who' that are aligned to your 'why'

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Potential collaborators: Issue Area A

A)	B)	C)	C)
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Strategy, business model and brand

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Financial performance and health

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Leadership and organizational culture

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How does the potential collaborator contribute to our strategic why?

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**This is where you should start to apply the due diligence questions to each org. You may be able to eliminate some pretty quickly which will help manage the amount of research you have to do.**



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

Your strategic why

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Types of 'who' that are aligned to your 'why'

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Potential collaborators: Issue Area B

A)	B)	C)	C)
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Strategy, business model and brand

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Financial performance and health

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Leadership and organizational culture

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# Collaboration rationale: Potential partners

**'Operational How': TBD**

**Should collaborate  
if you believe...**

**Should not collaborate  
if you believe...**

**Our  
Agency**

**TBD**

**Jointly,  
and for  
the  
field...**