

# Do More Together

---

Collaborate. Partner. Share.  
A step-by-step guide

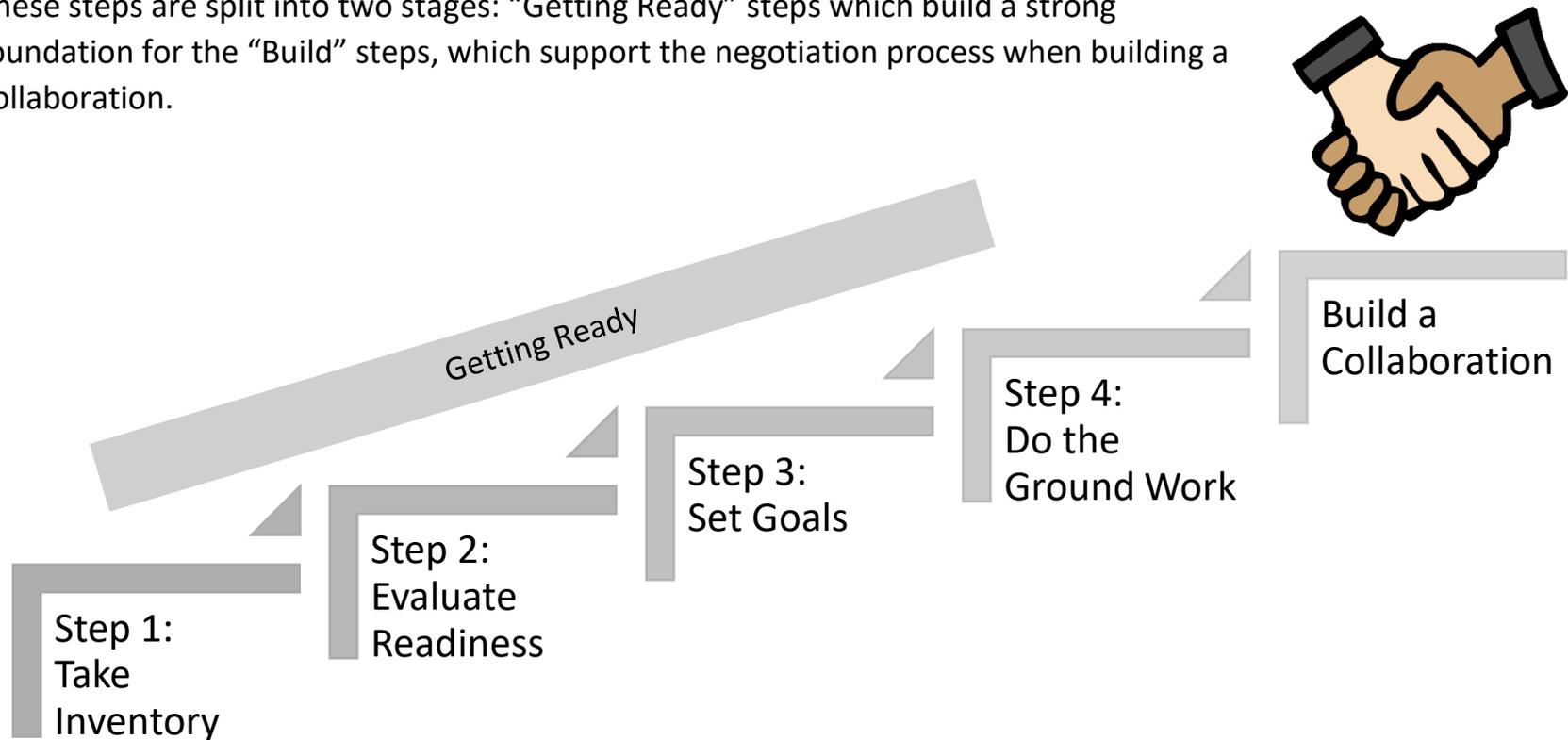
Authored by: Crystal McEachern and Polly McDaniel

# Collaborate. Partner. Share.

No matter which terms you use, there are many ways to express the concept of working with others to do more. Successful partnerships can solve problems, create new opportunities, reduce costs and build strong, resilient networks.

You can increase the likelihood of your partnerships being successful and beneficial to all involved, by completing a few steps early. This eBook will walk you and your organization through suggested step-by-step process from the start to finish of building a successful partnership.

These steps are split into two stages: “Getting Ready” steps which build a strong foundation for the “Build” steps, which support the negotiation process when building a collaboration.



# Introduction

There are countless ways to share and collaborate with others. Helplines, crisis centers, warm Lines, ADRCs, survivor support services, government agencies and information and referral services are partnering with each other as well as health care providers, other community-based organizations (CBOs) and governments to solve common problems, streamline services and provide person centered assistance to those in their communities that are in need. These organizations, and more, are also working together to track and resolve social determinants of health (SDOH) to improve overall quality of life. There are countless types of partnerships, each with their own benefits and challenges for all involved. While it's not possible to list everything, here are some common themes:

- **Resource Database Sharing**

Collaborative network of providers, each with their own resource database of community service information, focusing on a subject or geographic service area. Partners in the collaboration share their unique resource database often resulting in deduplication of work, and better quality, comprehensive data.

- **Resource Management Sharing**

Partners who work together to curate, update and maintain a database of resource information. The network shares policies around inclusion/exclusion, style guides, and categorization. They share the responsibilities to ensure that the data meets their agreed upon policies splitting the work across the partnership.

**Learn More about  
Sharing a Database of  
Community Resources**



- **Contact Center Backup and Sharing**

Providers work together to answer incoming phone, live chat, SMS/texting or other contact types. These relationships may be limited to specific events (disasters), timeframes (overnight coverage), or may be more broadly used to share workloads.

- **Centralized Intake**

One organization acts as the community’s primary access point for a multitude of services. This allows for community members to better understand where to go to access services and streamlines their intake. Partners’ time can be spent working with those they can help rather than re-directing them to other organizations and/or programs. These are sometimes referred to as “No Wrong Door” initiatives and can lead to more people being served and better outcomes.

- **Continuity of Care**

Emergency service organizations are working with CBOs to divert non-emergency cases and reduce re-admittances to emergency rooms and other emergent services by offering care coordination with service providers to close dangerous gaps and improve outcomes through follow-up.

- **Information Exchange Initiatives**

Providers are working together to make closed-looped referrals, participate in community care planning, or post disaster planning/response. These typically include one or more of the types of partnerships already described as well as documenting the outcomes of the interaction. Information exchange initiatives may also include post-disaster needs data shared to FEMA or to State Emergency Management Offices, family unification initiatives, health care providers or government bodies for planning and development.

### Read More



Offer Centralized Intake



Ensure Continuity of Care



Dispatch Mobile Crisis Services

# Challenges

There are many challenges that can be solved by partnering or collaborating with others. They often fall into three categories:

**Not enough funding:** Unfortunately, not having enough funding is universal. Who isn't feeling the need to do more with less, either because of loss of funding entirely, cut backs, rising costs, or a combination of all these things. "Not enough funding" challenges present in several different ways:

- Decrease in quality
- Decrease in service hours
- Decrease in the number of people helped

**Not enough volume:** A decline in people reaching out for assistance is being seen across sectors. This could be due to marketing, the need to offer newer modes of communication such as live chat or SMS/texting, or other reasons. When your organization is not being contacted enough, your:

- Volunteers and staff become bored and uninspired
- Community members and people do not receive the help you can offer
- Without helping the people you are intended to help, your funding can decrease



**Too much volume:** The other end of the spectrum, having *too many* people contact you for services/assistance, can cause additional challenges:

- Long waits/queues for people to get the help they need
- Overwhelmed, burned out staff and volunteers increasing turnover, hiring and training costs
- Decrease in quality, doing the bare minimum to keep up with demand

## Turn Challenges into Collaborative Opportunities

Every challenge has potential to turn into an opportunity by finding creative solutions. Creative solutions start by thinking about what you have in new ways. By considering new ways to market resources you already have (data, technology, human) to meet additional needs, you create opportunities to serve more people, find new revenue sources, and create strong networks. Creative solutions could be:

- Contracting to answer after hours calls for EAP programs or counselors
- Screening intakes for service providers such as mobile crisis response
- Managing resource information

Collaborative opportunities are also created to share other organizational responsibilities such as marketing, human resources or legal oversight.



# Getting Ready to Collaborate

Before entering into any collaboration negotiation complete the 4 “Getting Ready” steps. These are designed to walk you through tangible steps to ensure you are ready to build a successful collaboration. While they may take some time, they will save a lot of effort as you build your partnership.

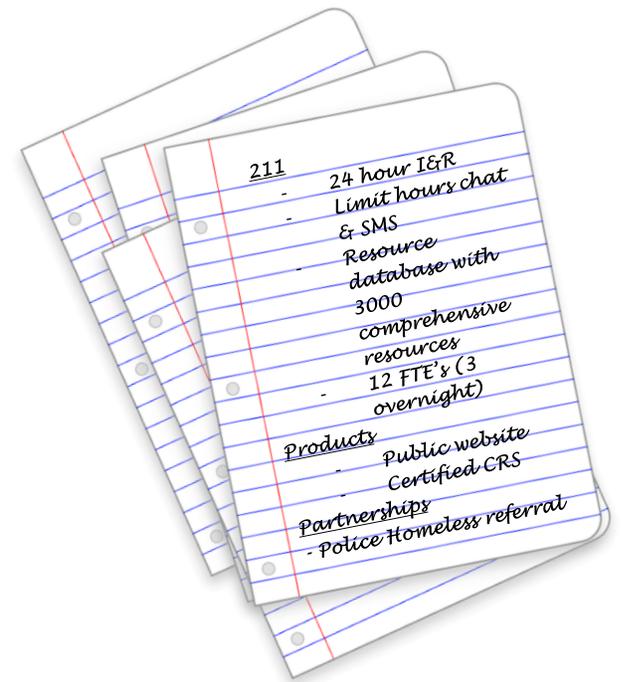


## Step 1: Take Inventory

What products and services do you have? What do you do and do well? What don't you do so well? Be honest as you are creating your inventory list. It will allow you to think strategically about the value you could bring to a potential partnership and begin to identify what you might need in return.

### Add to your inventory list:

- Products, services and resources you already have
- Existing partnerships (informal or formal) that you currently have or have had in the past. Include those that were not-successful, and any lessons learned from the experience.
- Accreditations, certificates and areas of expertise you have
- Details about your organization that show stability
- Details about your organization that show vulnerabilities



## Step 2: Evaluate Readiness

The second step is to evaluate your organization's readiness to collaborate. As you work through these five areas to evaluate your readiness, remember to continue updating your inventory list.

- **What do you have enough of?**

Consider which resources you have enough of, and if you have any resources or services which are operating below capacity. For example, your overnight call volume may be low, leaving your staff without relevant work.

- **What technology and tools are available to you?**

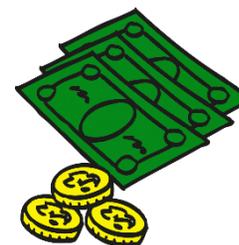
What do you currently have available to you that may help build a successful collaboration? List the software you use; include your CRM and Telephony provider. List the features they offer such as Application Programming Interface (API), exports, printable or online resources, and survey forms. (TIP: Consider including these in your inventory list)

- **What costs will there be?**

Will there be costs for additional technology, staff or resources? Will these be in-kind costs, or real dollar costs? Ask yourself what the in-kind dollar value is that you bring to a partnership? Do you have a budget to bring real dollars to help build the partnership? If not, can you get it? What will it cost to provide and train additional staff to work on the partnership? How many FTEs are needed to manage your database as it is? How many if you expand it, or build a secondary database? How much time do you have to devote to the partnership? Will you have to shift priorities?

**Not sure how to get funding  
for new technology?**

**Learn How!**



- **What is your team's comfort with change and sharing?**

This is one of the more difficult steps, as it requires an understanding of the personal strengths, goals, and limitations of your individual team members. Teams who are change resilient, open to sharing, excited or at least on the same page of why a collaboration may be necessary and beneficial will experience the collaboration building process more positively than those who may be struggling with the idea.

By hosting individual and group meetings with key staff and teams early, even before a potential partnership is in sight, you can help your teams feel included and get excited and prepared for the change. Include those who are involved in the day-to-day service delivery as they may identify additional areas, barriers, problems or tasks early on which will allow you to better plan to address those issue to make your collaboration more successful.

As you meet with your team members, try to understand each individual personal vision of what a collaboration could look like, what their strengths are, and how open they are to compromise and to work through any difficult issues and change. During these meetings identify who your main champions might be to engage them in assisting those that are resistant to change. Be sure to include the resistors in your ongoing conversations. These people often ask the tough questions which need to be thought through, issues that champions may oversee with their excitement of new possibilities.

- **Determine where you can, and cannot compromise**

As you talked to your team members, your teams may have brought forward some areas, work flows and philosophies that should not change – it's okay to have areas which you cannot compromise. Be sure to document each of these areas and include a short description explaining the rationale for your decision.

Identifying and documenting areas which cannot be compromised early in the process will help when negotiating and evaluating a new partnership. This will better prepare you to defend your decisions and if necessary to challenge why a compromise cannot be made. Every partnership includes some kind of

compromise, it's good to identify early on what "hills you are willing to die on" which will allow you to walk into a collaborative negotiation knowing what is really important to your agency.

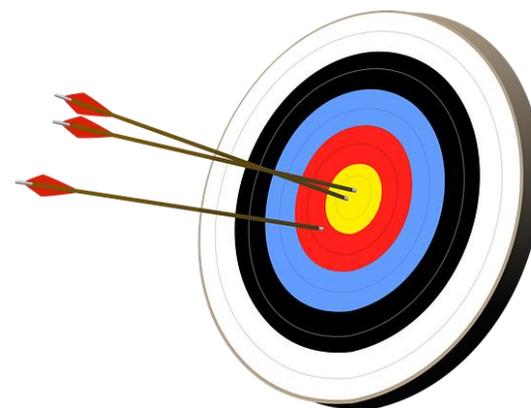
### Examples might be:

1. You collect limited demographic data on your help-seekers now but are willing to collect more to meet a collaborative partner's needs.
2. You maintain a resource database with a strict inclusion policy and are not willing to include records that do not meet your inclusion criteria. You might, however, be willing to maintain a secondary database that would meet the needs of the partnership.
3. While you don't normally print resource directories as they are outdated so quickly, you may be willing to create a specialized printed directory or portal on your website for easy access to the community resources needed by the partnership.

### Step 3: Set Goals

By setting goals up front, even before you find an agency to collaborate with, you will be better able to evaluate potential partnerships. Setting goals helps build focus around the types of collaborations which may bring value to your organization. Ask yourself these questions to get started:

- What do you want to gain?
- Do you want to free up staff time to work on other projects?
- Do you want to decrease your costs? Would it be more cost effective to contract out part of what you do?
- Do you want to increase your volume? Why?
- Are you looking to increase the visibility of your agency in the community?



- Do you want to increase your revenue? Can you contract in services? Can you take calls for others during slower overnight hours?
- Do you have a service to “sell?” Do you have an excellent training program that may be beneficial to others in your community? Do you have technology tools that others would find value in, such as printed directories, data collection/intake/screening processes?

Consider what a successful partnership would look like for you.

- What is the perfect scenario? What is the worst scenario?
- What do you feel success would look like for your potential partner? What about failure?
- How would you and your partner each benefit from the partnership?
- How will you define these goals?



## Step 4: Do the Ground Work

“Ground Work” is all about setting yourself up for success by identifying areas of concern and tasks or gaps which may be a barrier to collaborating. Tasks that you add to your “Ground Work” list should be prioritized into what needs to be completed before a collaboration, and what can wait – keeping in mind that not all tasks need to be completed before considering and beginning to work on a new partnership. Having a plan to address these items and being honest about your strengths, weaknesses and those things that are in progress will show a potential partner that you are knowledgeable, prepared and serious about collaborating.

Create a list with each task, and work to prioritize and assign tasks to team members. Include things like:

- Update processes, tools and policies
- Identify any housekeeping tasks that you have been “meaning to get to”
- Continue your internal conversations about collaborative goals and what your vision of success looks like. Ask your teams for ideas and work to get everyone on the same page.
- Create value statements to identify what you bring to the table and the value that you can offer to potential partners
- Put the word out by updating your website to talk about ways you can collaborate and inviting potential partners to contact you.
- Join local groups, councils and task forces to understand the needs of other organizations and start networking
- Participate in online groups and networking opportunities. Many accreditors and software solution providers have online communities to help their users’ network and share ideas.



## Building a Collaboration

Congratulations on walking through the getting ready steps, putting yourself out there and networking to your first potential partnership!

Your first potential partnership is very exciting, and it can be tempting to dive in head first. However, to increase the likelihood that the partnership will be strong and successful for everyone, it is imperative that you work through a few steps to evaluate and clearly agree to how you will work together.



## Step 1: Evaluate

Evaluating a potential partner may feel a lot like an interview for both you and the potential partner. It's important to have a mutual understanding of how each other operates, who they serve and their philosophies. Many of your getting ready steps will prepare you for these conversations.

Some questions and discussions to have include:

- How you will work together and is it a good fit for both organizations?
- Do your services complement each other, and if so, how?
- If your services do not complement each other, do they fill a gap or provide value?
- Do you have similar visions?
- Do they have a similar philosophy to yours? (e.g. Offering a non-biased service.)
- How long have they been in operation?
- How stable are they, their funding and staff? Are you comfortable with their level of stability and operational risk? (Note: High risk is okay, but knowledge is power!)
- Have they partnered with others in the past? Was the partnership successful? If not, what lessons were learned?



For every potential partnership, do a bit of research into their backgrounds. Do their accreditors, professional organizations, better business bureaus have any complaints registered against them? What is their social media/online presence? Whenever possible, just as you would before you hire a new team member, check their references.

Think about your “getting ready” steps, ask your potential partner the same questions that you asked yourselves. This will help you to see if they are ready for a partnership, as well as to show to them that you have truly thought this through.

### Partnership type specific questions

Depending on the type of partnership you are building, there may be additional questions and conversations to have with your potential partner. During the evaluation phase it’s important to consider any business rules and the way the participants will work together to make sure it’s a good fit for both potential partners.

### Contact/Interaction sharing questions:

- Will the potential partners answer and respond to contacts for each other? If so, when? Will it be on an ongoing or emergency basis?
- Will the potential partners respond to help-seekers outside their physical area? Do any processes, technology, reporting, need to change to support this?
- How will the potential partners respond to frequent callers? Is there a need to share personal or identifying details about the individuals between the partners? What data security policies will be in place to protect the personal data?
- What demographic information is collected by both parties? Is there comfort for all questions?
- What reporting and access to data is needed by both parties?
- What collected information will be shared with third-parties/funders/etc. What security policies will be in place to protect the personal data?
- Who will own the submitted records/data?



### Resource/Referral sharing questions:

Resource sharing can exist between centers who do not share Contact's, however its common for those who share contacts to also share Resource data to make referrals.



- What needs do the potential partners have when providing a service referral?
- What types of referrals are needed? Do either of the partners require access to each other resource records to be able to support the collaborative program? Are there records that do not meet a potential partners inclusion criteria? How will those records and situations be handled? (Examples: One partner provides only pro-life referrals, while the other provides pro-life and pro-choice based on the help-seekers preference, how will situations where philosophies may differ be handled?)
- What are the inclusion policies for each partner's resource database?
  - Are there any record types including in one system which are not in another (e.g. Listings for all schools including their principals and other key contacts within a school division. Or inclusion a partial list of for-profit phycologists or other agencies.)
  - Are there record types which will exist in both systems, how will duplicates be handled?
- What type of referral information is provided about referrals? (descriptions, hours, eligibility, required documents, worker names, etc.)
- How will records be shared between partners? Can technology help? Are there Application Programming Interfaces (API), printed directories, websites, exports, client-to-client sharing, etc. available?

## Resource management sharing

- What record structure do the partners use? Are they using the same system or different systems for resource management?
- What style guides and policies for quality used? How similar are the policies?
- How are records indexed or categorized? (e.g. 211 Taxonomy, custom categories, or other system)
- How are big changes decided and handled? Such as enabling shared settings/features, creating new fields or managing field visibility?
- Who has editing permission and to what? Is there an identified leader for each team of resource editors? How are conflicts managed?
- When are records updated? What method and process is used for updating?
- How are suggested changes managed between partners? When one resource editor gets new information or has a suggested change for a record they do not manage, who are those requests sent too?



## Outside data sharing

After you have shared your resources and data with your potential partner, how do they plan to use that data?

- How will shared records be used? Can they be printed, put on a public website, exported or given/sold to others?
- How are external partners and intended usage evaluated and approved?
- Are there any limits for the data and what should not be made public?
- Will the data be made available to the public on websites? Which websites and what is the process for including it on more?
- Who makes decisions for when records are shared outside of the partnership?

## Step 2: Set Goals and Outcomes

As early as possible when building a collaborative relationship, set, define and document your goals and outcomes for the partnership.

Taking the time to document each potential partner's goals and what they want from the relationship, brings honesty and accountability to the relationship. Write these as a vision statement. This will give you something to reference if the project takes a different direction. This is also the time to start discussions on identifying the lead person and/or agency for the partnership, and even who will hold financial oversight.

Setting goals and outcomes early and documenting them in a vision statement allow you to:

- Identify the challenge(s) you are solving
- Know what you are working towards
- Have a reference point if the project starts to take a different direction



Get Help  
Creating a Vision Statement

### Step 3: Define Indicators of Success

What does success look like for you? For your partner(s)? Look back at your Getting Started Goal Setting step – what did you identify as success there? Now that you are working on a partnership, do those goals still hold true to the vision statement you created? Document each goal and desired outcome and list what the indicator of success should be. Each should be able to be measurable in some way. While antidotal “it feels like we have better resources”, or “If it feels like we have more calls overnight” may provide “warm fuzzy” feelings about the partnership, it really comes down to data to prove that the partnership has been successful. Consider the data you are currently collecting or that you may start to collect through the partnership.



Set each goal to be specific. Consider adding measurable numbers which you are hoping to hit within a specified timeframe (e.g. 10% reduction in 6 months). Its not enough to say that a success indicator is an increase in overall call volume. How much of an increase would indicate that the partnership has shown value? Is there a specific timeframe that the call volume should increase by? Or perhaps it isn't call volume, but number of persons enrolled into a particular program or number of new resources added or updated into the resource database.

Example goal	Example indicator(s) of success
Better utilize overnight staff hours. (More calls/contacts, more relevant work, etc.)	Call/contact volume increases 20% during overnight hours within 1 <sup>st</sup> quarter of go live date.
Reduce duplication of effort managing resources	Reduction in FTE's required to manage resources by 10% within 6 months.
Increase in enrollment	Increased enrollment by 25% within first 18 months.

## Step 4: Create Agreements

While we are not legal experts, we do always recommend creating and documenting agreements for how you will work together whenever you enter into a partnership.

To document your agreements, you can choose to create a Memorandum of Agreement (MOA) or a Memorandum of Understanding (MOU), which both offer a non-legally binding, formal agreement between two or more parties, that explains the terms of how the partners will work together. If you are having trouble entering into a partnership using an MOA, consider using an MOU which some may be more comfortable signing. While MOU/MOAs are not legally binding they carry a degree of seriousness and express a mutual respect for all parties involved. MOU/MOAs are a great way to define a relationship and have a common understanding of the terms of engagement.

Consider starting to create an MOU/MOA early during a collaborative negotiation, even before the partnership is fully defined. The MOU/MOA gives you a place to document key decision points and important requirements for your project. Even if the collaboration does not move forward, you will find that you have documented and refined your requirements so you will be better prepared for the next partnership opportunity.

Many of the decisions you make during your “Getting Ready” steps and throughout your conversations with your partner(s) in the Build stages will help when creating your MOU/MOA, so keep your MOU/MOA in mind throughout all of your conversations and this entire process.



These are a few of the common sections included in MOU/MOA's:

1. **Introduction:** Describes what the agreement is, the need, the solution, who the partners are and why they are working together.
2. **Purpose:** A concise statement discussing the intention of the new capacity created by the collaboration. It includes how and when the new capacity will be used. This is most often your vision statement that you created when determining your goals and outcomes.
3. **Scope:** Lists who will use the new capacity, including agencies, end users, governments, or anyone else involved.
4. **Definitions:** Defines any operational or technical terms associated with the new capacity, intended to reduce confusion.
5. **Policy:** Describes circumstances when the new capacity can be used, how to authorize use, new activations, timing, costs, etc.
6. **User Procedure Requirements:** Outlines any obligations for sharing the new capabilities, like training, exercises, user requirements, technology requirements, and marketing. This section also includes who is responsible for the costs and resources needed.
7. **Maintenance:** Describes who is the designated and responsible party or parties for maintaining equipment, systems, and licenses.
8. **Oversight:** How will agencies deploy the new capability, and are there any governing bodies who oversee the use of the capabilities and enforces requirements? Who is the chair of governance and how they are they appointed, what are participating requirements, how are issues addressed, is there any voting?

9. **Responsibilities for SOP compliance:** Who is responsible for ensuring standard operating procedures (SOP) are followed? Who is responsible for training and ensuring the policies are followed? Who is responsible for quality assurance?
10. **Updates to the MOU/MOA:** How updates can be made to the MOU/MOA, who has authority to make changes, how agencies are notified of updates, and how updates are accepted. How can the MOU/MOA be terminated, how much notice is required, what process to take?

If you have taken the steps to identify your goals and set in writing the responsibilities and expectations from your relationship, putting together an MOU/MOA will be a simple process.

## Conclusion

In each challenge faced by a not-for-profit organization, there is potential for opportunity through creative solutions. This is especially true when dedicated partners band together and work towards a common goal. If you put in the necessary analysis and goal-setting ground work, you'll be setting yourself on a path to success that will benefit your entire community.

At iCarol, we are honored to offer a technology solution that makes collaborating and sharing easier. We hope this step-by-step guide to getting ready for and building collaborations provides you with a firm foundation and confidence to pursue partnerships, regardless of the technology you use to meet your goals.

If you would like to discuss how iCarol technology can help with your next collaboration project, or if you have feedback about the content or your experience using these steps, please do not hesitate to reach out to [info@icarol.com](mailto:info@icarol.com).

## Additional Resources

Partnership Assessment Tool for Health. Retrieved from [https://www.chcs.org/media/Partnership-Assessment-Tool-for-Health\\_FINAL.pdf](https://www.chcs.org/media/Partnership-Assessment-Tool-for-Health_FINAL.pdf)

Taylor, A. (2017, May 17). Hacking Nonprofit Collaboration. Retrieved from [https://ssir.org/articles/entry/hacking\\_nonprofit\\_collaboration](https://ssir.org/articles/entry/hacking_nonprofit_collaboration)

Chandler, J. (2016, September 14). 5 Tips for Nonprofit Collaborations. Retrieved from <https://www.councilofnonprofits.org/thought-leadership/5-tips-nonprofit-collaborations>

Grantspace Collaboration Hub. Retrieved from <https://grantspace.org/collaboration/>

Winer, M.B. (1994). *Collaboration Handbook: Creating, Sustaining, and Enjoying the Journey*. St. Paul, MN: Amherst H. Wilder Foundation.

Louis, S. (2019, January 16). Addressing Imminent Risk via Collaborative 911 Relationships and the NENA Suicide Prevention Standard. [Webinar]. Retrieved from <https://webinars.icarol.com/addressing-imminent-risk-via-collaborative-911-relationships-and-the-nea-suicide-prevention-standard>

Allen, M., Peterson, C., Tzurdy, C. (2017, October 4). Suicide Prevention through Emergency Department/Crisis Center Partnerships. [Webinar]. Retrieved from <https://webinars.icarol.com/suicide-prevention-through-emergency-department-crisis-center-partnerships>

McKechnie, N. (2016, October 4). Using Data Repositories to Build Partnerships and Explore New Revenue Streams. [Webinar]. Retrieved from <https://webinars.icarol.com/using-data-repositories-to-build-partnerships-and-explore-new-revenue-streams>

MacDonald, D. (2016, November 30). Introduction to Calculating Social Return on Investment. [Webinar]. Retrieved from <https://webinars.icarol.com/introduction-to-calculating-social-return-on-investment>

## About the Authors:

Crystal McEachern  
Senior Product Manager  
[cmceachern@icarol.com](mailto:cmceachern@icarol.com)

Crystal has a diverse career background spanning the fields of technology, crisis, and information and referral (I&R). While working on the Resource Team at her local 2-1-1, Crystal was responsible for the oversight and management of the local and provincial Resource Database, participating in several collaborative projects during her time there. As Senior Product Manager for iCarol, Crystal oversees numerous customer collaborations, using her industry experience and collaborative expertise to guide iCarol customers through their collaboration plan, and ultimately execute successful partnerships to benefit the people they serve.

Polly McDaniel  
Former Director of  
Business Development

Polly's total of 12 years in the information and referral industry includes 9 years at The Institute for Human Services' 2-1-1 HELPLINE program, most recently serving as Operations Manager. While overseeing operations of the contact center and the resource department, Polly frequently collaborated with community partners on various initiatives and multiple task force groups. As the Director of Business Development for iCarol, Polly worked closely with current and future iCarol customers, identified their needs and offered solutions that empowered them to meet challenges and deliver successful programs to their communities.

