NONPROFIT RESILIENCE HUB | Forefront

From Pain Point to Partnership:
A Starter Worksheet for Exploring Collaboration

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Before you can decide if and how collaboration might move your mission forward, you need to get honest about your why. This worksheet is a starting point for developing your rationale for collaboration — a place to think before you bring anyone else into the conversation.

Question 1: What is your pain point?

Every serious collaboration conversation starts with a real organizational problem — not a trend you feel pressure to follow. Before naming a partner or a structure, name the pain.

Guidance: Be specific. "We're struggling" is a feeling; "We've lost two development staff in 18 months and can't sustain our individual giving program" is a pain point. Try to distinguish between a capacity problem (not enough people, money, or time), a capability problem (we don't have the expertise), and a relevance problem (our model doesn't fit the community anymore). Most nonprofits are dealing with a blend of these — naming which one is holding you back will shape everything downstream.

Define a specific pain point:

Question 2: What skills or resources might address that?

Before you think about partnership types, think about what would actually solve the problem if you had it — regardless of where it came from.

Guidance: Don't worry yet about whether this sounds like a "collaboration" — just name what's missing. Is it a skill (grant writing, HR expertise, financial management)? A resource (a database, office space, a shared platform)? A relationship (access to a funder, a referral pipeline)? Or simply more capacity (more hands, more hours, more bandwidth)? You don't need to know yet whether that comes from a merger, a shared services arrangement, or just hiring — right now you're only naming the gap, not the fix.

Brainstorm:

Question 3: What type of partnership would you consider?

Collaboration isn't one thing — it's a continuum, from informal cooperation all the way to fully integrating two or more organizations in ways that change the legal structure or operating model. The right response depends on the problem.

Guidance: Match the structure to the pain, not the other way around. A capacity problem (e.g., insufficient or unsustainable back-office functions) might point toward shared services or a joint administrative platform. A capability problem (e.g., a program that needs expertise you don't have) might point toward a program partnership or subsidiary relationship. A relevance problem (e.g., your mission increasingly overlaps with another organization's) might point toward a deeper structural conversation — up to and including merger. Resist jumping straight to the most dramatic option; the goal is the smallest and simplest structural change that actually solves the problem. Knowing when <u>not</u> to collaborate can be just as valuable.

Here are some examples but don't limit yourself with jargon. Describe the partnership you envision in your own words:

Alliances and Networks	*Shared Programs or Services*	*Integrations*
Joint ventures, Parent-subsidiary relationships, Program and asset transfers, Mergers, Management Services Organization, Professional Employer Organization	*Co-location, shared staffing, Fiscal Sponsorship, shared back-office services*	*Coalitions, Collaboratives, Movements, Collective Impact, Mutual aid networks, Federations, Cooperatives*
My idea of collaboration:		

Question 4: Who do you know in your network?

Successful collaborations rarely start with a formal RFP, a legal team, or a grant — they start with a relationship. Someone you already trust, in a room you're already in.

Guidance: Think about the skills or resources that would fix your pain point - who does that well? Think beyond the obvious "competitor" or "similar mission" organization. Consider your board members who serve on other boards, funders who've mentioned other grantees facing similar issues, peer EDs you already trust, and organizations you already refer clients to informally. Programmatic alignment is one thing, but strong partnerships can form even among organizations working on different issues. The strongest early conversations tend to happen with people who already have some trust built up — even if the organizations have never formally partnered.

Brainstorm a list of organizations or leaders who might be potential partners or could lead you to other partners. You don't have to share your list with anyone. Just jot down the names of people and organizations you wish you worked with more closely:

- ____________________
- ____________________
- ____________________
- ____________________
- ____________________
- ____________________
- ____________________
- ____________________

Question 5: Dream about what’s possible

Before due diligence, before board approval, before any of the hard mechanics — give yourself permission to imagine the best-case scenario.

Guidance: This is deliberately the least structured question. Don't self-edit for feasibility yet. What would it feel like for your pain point to be solved? If that problem were taken care of, what would it make possible for you or your team? More time? More energy? Less stress? What would your community notice? Leaders often skip this step and go straight to logistics — but the vision you sketch here is what will help you (and your board) tell the difference between a collaboration worth pursuing and one you're only considering out of obligation or fear.

Dream big:

This worksheet is an entry point, not a decision. If your answers point toward a real opportunity, the next step is a formal readiness assessment — a deeper look at your organization's capacity, culture, and timing before any conversation with a potential partner begins. When you have a clear rationale and a goal in mind, everything flows from there.