

# IFEX Collaboration Tools:

## Checklist for Initiators

This checklist facilitates self-reflection and action planning for new or existing collaboration opportunities. It provides a series of prompts to reflect on how the IFEX Collaboration Principles are (or are not) integrated into a specific collaboration opportunity, taking into account the lens of an organisation leading or facilitating the initiative. Reviewing this checklist will help you think through and clearly articulate questions about how the conditions for collaboration are being cultivated and explore ways forward.

### Centering around purpose

- Have you taken into account the views of all potential stakeholders - including and most importantly - intended beneficiaries in the design of this project?
- Have you taken the time to share your understanding of the issue that you are seeking to address and how it aligns with your broader agenda, with all partners involved?
- Have you been clear about what role will each organisation play?

### Stage of involvement agency of partners

- Have you provided partners with sufficient information and time to adequately assess, review and evaluate the scope of work and available materials prior to their commitment?
- Have you considered what would draw each partner toward participation and engagement with this opportunity, and how they can benefit from it?
- Have you considered how you would like your collaborative experience to end? What would be some signs of a positive ending experience for this specific collaboration?

### Governance

- Is there clarity around the roles and responsibilities of all stakeholders involved? Are responsibilities based on each collaborator's expertise, resources, and bandwidth?
- Are you regularly reporting back to partners working on the ground on the work that you have done as part of the partnership, and more generally on your work?
- Have you considered which tools you will use to handle conflict and work out differences among the group in a constructive way?
- Have you considered the particular needs of diverse organisations to meaningfully contribute to this collaboration opportunity? (e.g., language barriers, working across multiple time-zones, different working and communication styles)

### **Power and worldviews**

- How well equipped is your team to open up to other worldviews and to engage in conversations about power and privilege?
- Are you aware of your organisation's history and reputation on building trust and facilitating collaboration opportunities with organisations from the Global Majority?
- Have you included dedicated spaces to deconstruct individual biases and preconceived notions about other stakeholders involved in this partnership? (e.g., stereotypes on minority groups or preconceived notions about Western organisation practices and funds) Do these spaces promote equal participation of all stakeholders?

### **Safety and wellbeing**

- When developing the risk assessment framework, have you considered the risks faced by activists, advocates, and CSO staff who are working on the ground, especially those who face immediate threats to their livelihoods and lives?
- Have you asked partners about what practices they would like to experience to build mutual support, and to avoid burnout and breakdown?

### **Transparency and flexibility**

- Are you sharing the overall project budget with all partners, and documents that you are submitting to your donors?
- Are the financial needs of partners taken into consideration upfront?
- Are you keeping promises and honouring partner requests?
- Have you set aside contingency resources that can be used to respond to emergent needs?

### **Honouring Collaboration**

- Are the costs of strengthening the partnership and cultivating relationships (e.g. in person convenings or governance meetings) built into the overall program budget?
- Have you identified ways to publicly recognise, reward, and celebrate collaborative behaviours?
- How are you planning to highlight the value of collective work in front of donors?

### **Accountability and recognition**

- How are you ensuring that progress is tracked not only in donor-defined metrics, but in ways that are meaningful to individuals and organisations working on the ground?
- How are you planning to acknowledge the contributions and intellectual property of all actors involved in this process?
- Have you considered ways to ensure that this partnership contributes to strengthening the visibility of on-the-ground CSOs?

## IFEX Collaboration Tools: Checklist for Partners

This checklist facilitates self-reflection and action planning for new or existing collaboration opportunities. It provides a series of prompts to reflect on how the IFEX Collaboration Principles are (or are not) integrated into a particular collaboration initiative, from the perspective of an organisation invited to join a collaboration effort. Reviewing this checklist will help you to think through and clearly articulate questions about how the conditions for collaboration are being cultivated.

### Centering around purpose

- Is there a clear articulation of the goals and the values that underpin the partnership?
- Does this collaboration opportunity respond to the needs, concerns and knowledge of those who best know the specific context or lived experience?
- Is there a shared vision regarding the long-term transformation or are exchanges focused on short term inputs and outputs, and specific project targets?

### Stage of involvement and agency partners

- Have you been able to share your understanding of the issue, to set realistic expectations about how your organisation can contribute and what risks you foresee?
- Do you get to provide input to the scope of work and terms of relationship, before the collaboration opportunity is formally captured into a contract?
- Are you granted the opportunity to provide input on the evaluation and performance indicators?
- Do on the ground actors have agency to make day-to-day decisions concerning the implementation based on their expertise?

### Governance

- Is there clarity around the roles and responsibilities of all stakeholders involved? Are responsibilities based on each collaborator's expertise, resources, and bandwidth?
- Have your particular needs (e.g. time difference, internet access) and preferred communication style been considered when defining the ways of working together?
- Is this collaboration framed as a two-way knowledge transfer (ideas, skills and resources)? Do you have opportunities to challenge and/or refuse ideas or activities included in the plan?
- Is there a mechanism to review ideas and activities during the collaboration

### **Power and worldviews**

- Is there an acknowledgement of the power asymmetries among partners, and dedicated spaces to question and unpack power and privilege?
- Have you included dedicated spaces to deconstruct individual biases and preconceived notions about other stakeholders involved in this partnership? (e.g., stereotypes on minority groups or preconceived notions about Western organisation practices and funds)
- Is there a shared understanding of the power dynamics likely to affect the collaboration?

### **Safety and wellbeing**

- Are the risks and safety of advocates and CSO staff working on the ground, especially those who work in more hostile environments, being considered?
- Is there a plan for advocates and CSO staff in case their safety and security are at risk?
- Are concerns around sharing sensitive data about advocates and communities being addressed?

### **Transparency and flexibility**

- How much information are you provided about the overall funding arrangement?
- Are the administrative requirements proportional to your specific context and organisation?
- Are you being open about the full amount of funding needed for your organisation to meaningfully participate in this collaboration opportunity?
- Does the budget allow for adaptability, so that activities can respond to learnings from the ground and readjust to contextual changes?

### **Honouring collaboration**

- Are the costs of strengthening the partnership and cultivating relationships (e.g. in-person convenings or governance meetings) built into the overall program budget?
- Is there cohesion between the individuals and involved, and do they seem prepared to achieve the shared purpose or goal of the collaborative process?

### **Accountability and recognition**

- Are accountability processes centred around the communities being served, or do they respond only to donor-centric metrics?
- Is there clarity around recognising the contributions of all actors in the authorship of co-created materials and intellectual property resulting from this collaboration?

- Is there an open culture for regular feedback, open to unexpected outputs and failure, rather than communications being focused on periodic formal reporting dates?
- Are there clear communication channels to ensure feedback?