



TOOL STARTING TOOLS FOR YOUR COLLABORATIVE OVERVIEW

Using the right tools for a job makes a world of difference. The same goes for the tools a collaborative uses to be successful. Today, collaboratives have a lot of choice when it comes to online tools for communication, meetings, documentation, and task tracking.

Communication tools allow members of collaboratives to exchange ideas instantly, resolve questions quickly, and stay connected between meetings.

Meeting tools let people meet in real time across geographic distances and can increase accessibility for those with unreliable transportation or mobility challenges.

Documentation tools ensure that knowledge isn't trapped in someone's memory; instead, decisions, processes, and experiences are captured in a shared space that members can reference at any time.

Task tracking tools bring visibility and accountability to collaborative work by clarifying who is responsible for what, by when, and how each piece fits into the larger effort.

Together, communication, meeting, documentation, and task tracking tools reduce miscommunication, solve some barriers to participation, prevent duplicated effort, and create a transparent record of progress that keeps everyone working toward the collaborative's goals.

WHEN TO USE

It is helpful to decide which tools will be used by your collaborative early-on because habits and modes of communication tend to stick. Even more importantly, the collaborative should make decisions on tools together because it will take everyone's buy-in and use of the tools so that they work at their best.

Making these decisions and setting up the tools early-on also forces the collaborative to clarify roles, decision-making processes, and expectations before ambiguity creates frustration or unproductive conflict. It lays the foundation for transparency and trust as the collaborative grows. As time passes, your collaborative should plan to periodically check-in on how the tools are working and make adjustments as needed.



HOW TO USE

The “Starting Tools for Your Collaborative” tool speaks to a collaborative’s process on a tactical level. Before jumping into making process decisions together, your collaborative can use tools like [GRPI](#) to or clarify goals, roles, processes, interpersonal relationships or [POPRA](#) to determine purpose, objectives, process, roles, and agreements. Your collaborative can also decide on additional processes such as for addressing conflict, like the [Situation-Behavior-Impact-Intent](#), or voting, like [Fist-to-Five](#).

COMMUNICATION: How are we going to stay connected?

There are many factors to weigh in deciding how your collaborative stays connected. Do you want to find a free service, or do you have a budget for a subscription? What forms of communication do people in your collaborative already gravitate to?

Some good starting options are:

- **Email** - well-suited for formal communication, longer explanations, and creating a searchable paper trail. However, it can feel slow for quick back-and-forth exchanges.
- **Social media** - platforms like Facebook Groups can be appealing because most people already have accounts and check them frequently, which lowers the barrier to participation. On the flip side, they can blur the line between personal and collaborative use, and it is difficult to save important information.
- **Text Message or WhatsApp** - informal, real-time messaging works well for small groups needing quick coordination, but conversations can become chaotic in larger groups, and older messages are hard to save and find. WhatsApp is a popular tool internationally since it's free over the internet.

Your collaborative might decide that it's best to combine communication tools—email for formal updates and WhatsApp or social media for quicker communication- but be sure that you all create clear norms and expectations about which tool to use for what purpose.

MEETING: How do we gather?

When deciding where to gather, your collaborative should first think how easy it is for people to access the meeting location. A second consideration is how can we best accomplish our meeting's purpose and build connection?

Some options are:

- **In-Person:** In-person meetings build stronger interpersonal connection and are best for people who are not technologically savvy. They often create space for

spontaneous conversations that build trust and camaraderie. However, they might not work for people with mobility challenges, they require transportation which can be a barrier, and a physical location might come with a cost. Public libraries often have free meeting rooms that you can reserve ahead of time.

- **Virtual** - If your collaborative is comfortable with using technology and is spread-out geographically, virtual meetings could be a good option. Virtual meetings solve the challenge of transportation, although you do need internet access. With Google Meet's free service, you can have up to a one hour call with 100 participants.
- **Hybrid** - Your collaborative can also choose to have a mixed strategy - using video calls for planning meetings and having in-person gatherings for bigger meetings or retreats. You can also host a hybrid video and in-person meeting with a conference telephone, speaker phone, or Meeting Owl device. When deciding on the frequency on meetings, consider what's the least amount of time a collaborative needs to spend together to accomplish its goals. This may be 1 hour monthly meetings or even 30 minute weekly depending on the timeframe and workload.

DOCUMENTATION: How do we find information?

There are several good tools to store information, files, photos, and materials. Having a central online Folder for your collaborative lets members go back to reference materials on their own time, without needing to ask others to get the materials.

- **Google Drive** - Google Drive allows you 15GB of cloud storage for free. People can edit files without sign-in required.
- **Microsoft OneDrive** - OneDrive offers 5GB of cloud storage for free. Each person will need to create a Microsoft account or log-in with their email to access OneDrive.

TASK TRACKING: How do we know if something is done?

There are various tools that your collaborative can use to track the status of an action item or task - whether it is not started, in progress, complete, or if there is a barrier that your collaborative needs to overcome. Task tracking tools can also help your collaborative track who is responsible for each task and give you a birds-eye view on how task delegation is distributed and if it is working well.

Some starting tools for task delegation are:

- **Excel or Google Sheets** - Spreadsheets give total flexibility in how tasks are organized but they need to be both manually set-up in a way that is helpful to the



group and manually updated. Google Sheets is free but you need a subscription or a software purchase to use Excel.

- **Trello** – Trello uses a drag-and-drop task system which helps you visualize a workflow easily. You can also assign someone to a task and add a due date. However, Trello’s free version only allows up to 10 collaborators.

COMMUNITY LEARNING MODEL

Culture of Collaboration

Strengthen the capacities that support collaborative work such as facilitative leadership, communication, information sharing and shared accountability. These elements strengthen the ability to move through the stages of the Community Learning Model.

Starting Tools for your Collaborative is a tool for the Culture of Collaboration phase of the Community Learning Model. To learn more about tools for dialogue and the other areas of the Community Learning Model, visit civikkanopy.org/clm.

