



## **Toolkit Working Collaboratively with Internal and External Groups**

This toolkit goes over the various types of collaborations, why collaboration is important for CLA and issues to consider when deciding when and who to collaborate with for maximum success.

### **Types of Collaboration**

There are many different types of collaborations possible, depending on your goals and the goals of the collaborator. The most successful are true partnerships that are built from the ground up:

- 100% Partnership/Joint Collaboration from the ground up
- Collaboration for revenue share or specific purpose
- Collaboration in name only for marketing purposes
- Cross Marketing (no co-sponsorship)

### **Why is Collaboration Good?**

While it may seem easier to just plan an event yourself, the reality is we are better and stronger when we do things *together*. This applies to internal and external collaboration. What are the other reasons to collaborate?

1. It allows us to provide valuable content and/or networking opportunities to more members (internal) and it allows us to share the CLA brand to others (external);
2. Sections have cross over content or topics that may appeal to multiple groups. For example, a program on tax implications of a divorce may be important to both tax and family law practitioners and CYLA. Jointly creating content for this scenario is advisable.
3. It means we aren't duplicating efforts, draining resources or bombarding the same pool of members or potential members with programming that sounds remarkably similar;
4. We look more coordinated, as members are members of multiple sections;
5. It allows us to be respectful of member's email/social media (too many emails will make members opt out of everything or worse – tune out);

6. For external groups in need of specialized content they cannot produce on their own, it allows CLA to provide an important service to attorneys that may be beyond on current reach.

### **General Issues to Consider when Thinking about Collaborations and Partnerships:**

- Think about your goal for the collaboration in advance. Like a well-crafted settlement agreement, collaborations need to be win-win for each party involved and each party needs to define the “win” for themselves. Don’t assume adding their name to your program after it is fully developed is a win for them.
- It also best not to have “membership development” as your primary goal for an external collaboration. If your content is good, attorneys will want to join CLA and/or your section as an indirect benefit of the collaboration;
- CLE revenue is bread and butter income from most groups –both inside CLA and outside. Most, if not all, local bar non dues revenue is from providing CLE to their community;
- For some external groups, CLE is free and included in either basic membership or an enhanced membership category;
- Most regional/county bar association have the same if not more sections than CLA. Therefore, some external groups may, or do, view CLA as a competitor. It is best to research in advance if the group has an entity that covers similar content before approaching an external bar association;
- For many external groups, “co-sponsoring in name only” means you are taking advantage of their mailing lists. It would be better to approach them at the beginning of the program or event concept and see if you can create something together;
- Many regional bars will only co-sponsor in name only if:
  - The content is not something they typically offer to their members or they don’t have the ability or expertise to offer the content;
  - They want visibility for their association/brand through our marketing efforts;
  - They want to provide an enhanced networking opportunity for their members; and/or
  - Their members receive the same registration rate as our members;
- Cross marketing or co-sponsoring programs in name only doesn’t create a partnership where there is buy in. For maximum buy-in, consider a more specialized collaboration.
- We share members. Most attorneys are members of multiple bar associations – regional, state, affinity/identity and/or
- We share leadership. Many of our ex comm members either came from a regional bar’s board or section leadership or are still on these groups.

## **Types of Collaborations:**

### **100% Partnership/Joint Collaboration:**

This type of collaboration is the ground up and before planning gets underway, especially if both groups can claim some expertise in the area, or if both groups have something unique to offer the partnership. In addition, any program jointly developed will create more investment/buy-in from all partners. Generally, the following should be considered:

- It's best to put together a small planning committee of representatives from all groups before a topic is considered (a broad subject area is fine) and allow all partners to participate in the finalization of the topic and mutually discuss needs and goals.
- Start with the educational chairs and section coordinators for internal collaboration and section chairs (for specialized external collaboration) or the president of the group and their executive director (if the issue is more generalized). All this information is available from CLA and external group websites.
- Don't assume an external group needs this content; rather, ask if they are interested in co-developing a program.
- Generally, each group will bring something unique to the table that can be incorporated into the discussion:
  - Some groups can offer meeting space;
  - Some groups can offer taking the lead on CLE planning and registration;
  - Some groups can identify local needs;
  - Some groups can assist with suggesting diverse speakers
- For external groups where you may need an entrée, please work with CLA's Director of Strategic Partnerships and Initiatives, Ellen Miller who has well established relationships with most of the regional bar associations and can introduce the concept of a possible partnership.
- There should also be a discussion clarifying roles:
  - Should one organization take the lead in planning and if so who?
  - If there are shared roles, who is in charge of marketing, speaker preparation, registration, materials, evaluations, physical event coordination, food and beverage planning, expense payment etc etc.
  - Will the program be video recorded, and can the video content be shared post program?
- Typically, these kinds of collaborations work best when there is some revenue share discussion.
  - If the collaboration is internal, is there any reason why the net revenue should not be divided 50/50?

- For external collaborations, it's helpful to review what roles each group is playing and the resources used to determine what an appropriate revenue share may look like.

## **Other Forms of Co-Sponsorship**

There are a few other types of co-sponsorships that aren't developed from the ground up. These sponsorships usually involve a program or others are being asked to participate; event where:

- The event is already planned, and
- Others are approaching the program planner to become a co-sponsor.

Similar to 100% partnerships, these collaborations should be individually crafted depending on goals and needs of both groups.

### **1. Co-Sponsorship for Revenue Share**

This type of collaboration is when the program or event is already developed by your section and either another section or external group approaches you to be part of it, or you and another group decide that there is a reason a partnership after development makes sense.

Revenue Share would make sense if there are joint benefits for both groups, or if another group decides to hold off on a similar program or event to join forces with you.

### **2. Co-Sponsorship in Name Only**

This type of collaboration is when the program or event is already developed by your section, and you are looking for others to assist with marketing.

Generally, co-sponsorship in name only is just that – adding another group's name or logo to your program or event in exchange for their marketing the event to their members. A couple of things to note:

- Internally, if your goal is to market the program to another section, you should offer to list the section as a co-sponsor.
- As noted above, not all groups believe that adding their name as a co-sponsor to a program or event is a perk or advantage and may either decline or not get back to you.

## **Is Cross Marketing a Form of Collaboration?**

No. It is simply asking another group to market your program to members with nothing offered in exchange.

### Some examples recent collaborations or discussions:

- A CLA Section and a local bar section were both planning on producing the same program. Rather than duplicating programming and competing for the same attendees, the CLA section approached the local bar section to collaborate. Result: CLA Section was a co-sponsor of the local bar webinar series, where CLA marketed members to the local bar program. CLA members received the same reg rate as the local bar member. Any registrant that was sent from CLA formed a "pool" of revenue that was divided between CLA and the local bar section.
- CLA Section wants to put on a program in a local community on a topic the regional bar doesn't have expertise in. In addition, the local bar does not typically charge members for CLE (included in local bar dues) so a traditional revenue share not practical. Result: CLA and local bar co-sponsor a program that is developed based on content needs of the local community. Local bar provides facility at no charge; CLA provides content and keeps net revenue. Special terms negotiated around food and beverage costs.
- CLA and bar association want to jointly show expertise in an area. Both groups jointly develop the program and deliver the content that is recorded for the catalogue. Both groups post the recording of the session on their respective catalogues as a revenue generator. Primary Goal: branding both organizations; secondary goal: generating revenue.
- 2 internal CLA groups want to produce a program of interest to both groups. Content jointly developed, program is co-sponsored and marketed and both groups equally share in revenue.

For more information about internal collaboration, please contact your section coordinator. For more information about external collaboration, please contact Ellen Miller, Director of Strategic Partnerships and Initiatives at [ellen.miller@calawyers.org](mailto:ellen.miller@calawyers.org) or 916-873-6809.