Collaboration Toolkit

INN and RJI embarked upon this project with the goal to build a resource to help newsrooms collaborate in sustainable, useful and serviceable ways. We heard from our members (INN) and partners (RJI) that collaborations are harder than they need to be, so we built this toolkit to help journalists break down some of those barriers and expand their impact and resources.

We want you to be able to use this guide to inform your own collaborative work. We hope you mark up these pages, make copies, share links and suggest additions. Our nightmare is that this is consigned to gather dust. Our dream is that you find it a valuable resource that informs your decisions at every step of the collaboration process. Even if that means walking away from projects or partners because they're not a good fit.

This toolkit includes:

- A searchable database to help you find collaboration partners
- Budgeting guidance
- Revenue streams from philanthropic to events and sponsored content
- Project management guidance
- Templates in each section for you to utilize 

Produced by Kat Duncan and Bridget Thoreson // Launched Feb 2024

Additional contributions to this toolkit by the Local Media Association, the Wichita Journalism Collaborative, Proximate and Everyday Climate Champions // 2025

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How to build a sustainable collaboration

Find the right partners

Want to collaborate? **Add yourself to the collaboration station** to help potential partners find you who have aligned mission, values and/or audience.



And use it to find the right partners for your project, mission and audience.

Communication

A vital step to a successful collaboration is ensuring you have clear communication from the start so all partners agree on shared expectations. This includes how the collaboration will function, roles, funding and the mission of the project.

When you and your partners meet to discuss a potential collaboration, we recommend putting aside a day to work through this worksheet together. This worksheet addresses all the key facets of the collaboration so you can make decisions that help you avoid insurmountable hurdles later. This will ensure your project is set up for success as you move forward and/or help you realize if the partners are not a good fit for your project or you at this time.

This worksheet breaks down your group decisions around:

- Roles
- Funding
- Aligning mission and values
- How you will communicate
- What will success looks like
- Time investment

It is important that your group go through this worksheet thoughtfully and in its entirety so that you can move forward without any of these aspects becoming insurmountable hurdles later.

An especially key role: Having a Project Manager (whether it's someone in your collaboration or a third party you bring in for the project) can make or break your project's ability to move forward successfully.

A PM will hold everyone accountable to the group's agreed upon expectations, roles, budget, deadlines and ensure communication is clear throughout the project. If you don't have someone in your group who wants to act as project manager (see our PM section for resources they can utilize to help them with this work) we highly recommend enlisting a PM from an outside source.

Deciding what your collaboration looks like: *Collaborations aren't just one thing*

One of the sticking points in collaborations is that each individual partner often has a different definition of what a "collaboration" is and therefore, different expectations when they embark upon a collaborative project. This is part of why going through all aspects of the project up front with our worksheet is vital to making it a positive and enriching experience for everyone involved!

The two main types of collaborations that are often embarked upon:

- Cross publishing each other's work on an agreed upon topic or issue
- Co-reporting/editing/producing and then cross publishing or publishing on a 3rd party location together

That said, collaborations can also be:

- Co-hosting events
- Co-producing social content with an agreed upon strategy & co-branding
- Co-fundraising
- Co-building a news game or interactive experience
- Co-creating merch and cross selling it for both orgs
- Sky's the limit!

Remember, **collaborations do not have to be a standard journalistic piece**.

They can be documentary videos, listening events, fundraising efforts or social campaigns! Don't limit your collaborations by assuming it has to be a traditional package or piece of journalism - you can collaborate on any aspect of serving your community to expand your resources to deepen your impact.



Attendees at the Collaborative Journalism Summit work together as a group to discuss potential collaborations with our kickoff worksheet. Photo by Will Allen-DuPraw

Budgeting for your collaboration

Collaborations that go beyond swapping existing stories may require additional funding. Start by **building a budget** for your collaboration. Depending on your project, this may be a one-year budget, or it may be multi-year. Either way, you will want to project the **revenue** and the **expenses** associated with your collaboration.

To identify the **expenses** your collaboration will incur, you will want to think about the following:

- Personnel - Percentages of time allocated for all of the staff dedicating time to the collaboration
- Website and design
- Marketing and promotion
- Production costs
- Translation costs
- Community engagement
- Events
- Travel
- Organizational overhead
- Other miscellaneous expenses

Break these down into the following categories:

- What **resource costs** will participating in the collaboration require of each participant?
  This can include staff or freelancer time, any platform or distribution costs, and costs related to story production. It's important to note that the costs may not be equal for each newsroom in the collaboration: for example, an outlet that is providing data visualizations for other collaboration participants will have higher design costs. Be sure to include any organizational overhead for your outlet's time participating in the collaboration.

- What **infrastructure costs** are required? If you're planning to create a joint website, or provide translations of stories, or anything else that will be a shared resource among participants, discuss how those costs will be shared.

- Are any **additional hires required** to manage the collaboration? For instance, for a long-term effort you may need a project manager. Where will that role be situated and how will it be covered?

It is important to note that costs may vary by newsroom. For example, an outlet that is providing data visualizations for other collaboration participants will have higher design costs.

On the **revenue** side, you will project the funding raised by various sources, such as:

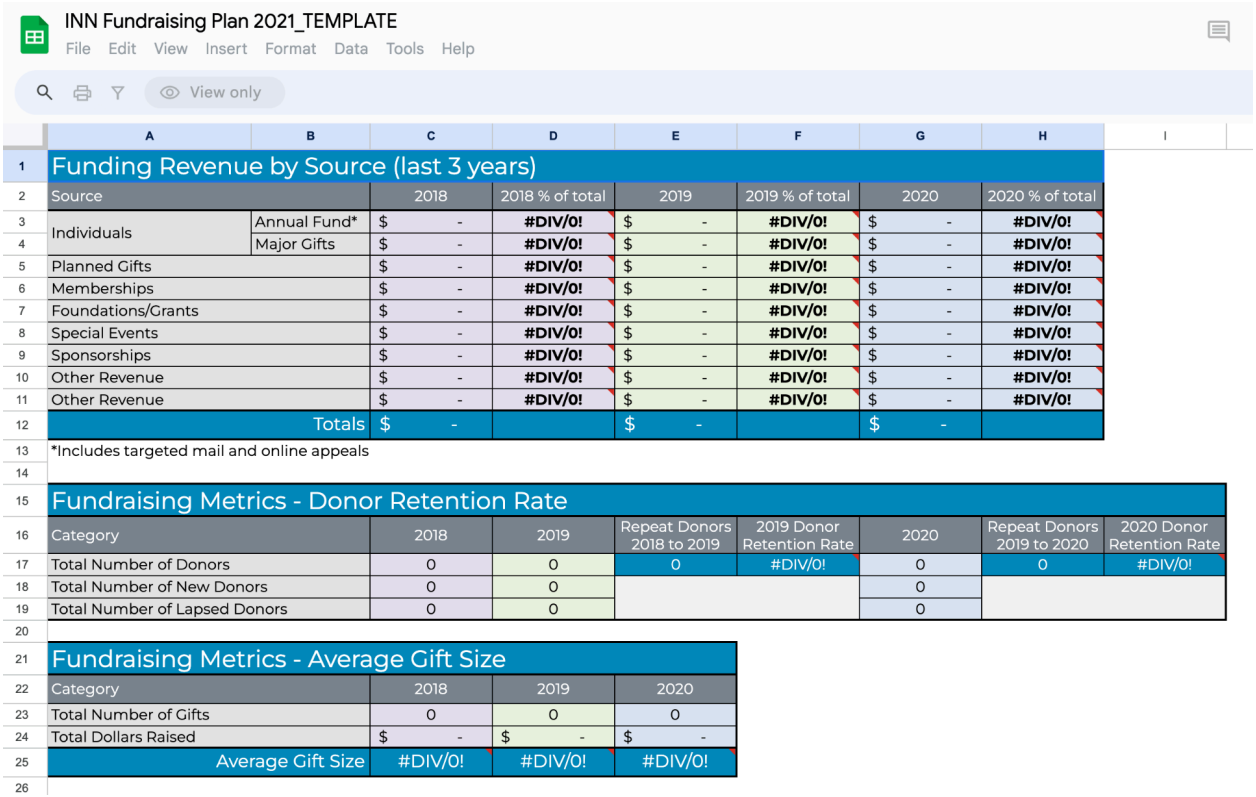
- Grants and foundations (most common funding source in the early stages)
- Sponsorships
- Individual donations

Remember that **your budget is a projection**. It's a working document that can be adjusted as the work of your collaboration grows and changes. Collaborative outlets can fundraise collectively or as individual outlets. Longer-term collaborations have the potential for sustainable funding, such as through donations or subscriptions.



Planning templates for collaborative funding

- Fundraising Plan Guide
- Fundraising Plan Template



INN Fundraising Plan 2021_TEMPLATE

File Edit View Insert Format Data Tools Help

View only

Funding Revenue by Source (last 3 years)

Source		2018	2018 % of total	2019	2019 % of total	2020	2020 % of total
Individuals	Annual Fund*	$ -	#DIV/0!	$ -	#DIV/0!	$ -	#DIV/0!
	Major Gifts	$ -	#DIV/0!	$ -	#DIV/0!	$ -	#DIV/0!
Planned Gifts		$ -	#DIV/0!	$ -	#DIV/0!	$ -	#DIV/0!
Memberships		$ -	#DIV/0!	$ -	#DIV/0!	$ -	#DIV/0!
Foundations/Grants		$ -	#DIV/0!	$ -	#DIV/0!	$ -	#DIV/0!
Special Events		$ -	#DIV/0!	$ -	#DIV/0!	$ -	#DIV/0!
Sponsorships		$ -	#DIV/0!	$ -	#DIV/0!	$ -	#DIV/0!
Other Revenue		$ -	#DIV/0!	$ -	#DIV/0!	$ -	#DIV/0!
Other Revenue		$ -	#DIV/0!	$ -	#DIV/0!	$ -	#DIV/0!
Totals		$ -		$ -		$ -	

*Includes targeted mail and online appeals

Fundraising Metrics - Donor Retention Rate

Category	2018	2019	Repeat Donors 2018 to 2019	2019 Donor Retention Rate	2020	Repeat Donors 2019 to 2020	2020 Donor Retention Rate
Total Number of Donors	0	0	0	#DIV/0!	0	0	#DIV/0!
Total Number of New Donors	0	0			0		
Total Number of Lapsed Donors	0	0			0		

Fundraising Metrics - Average Gift Size

Category	2018	2019	2020
Total Number of Gifts	0	0	0
Total Dollars Raised	$ -	$ -	$ -
Average Gift Size	#DIV/0!	#DIV/0!	#DIV/0!

Revenue & Fundraising

Philanthropic funding

A 2024 study conducted by the Center for Cooperative Media at Montclair State University, reported that philanthropy was the largest source of revenue for permanent collaboratives in the U.S.

Sometimes when news organizations first consider philanthropic funding as a revenue stream, they oversimplify the process. We make assumptions about funders such as they know the work that we are doing is important. Or that our work is so important that foundations should just support it.

Articulating the value of your journalism takes more than just sharing links. It's about showing the impact of your work so far, describing your relationship with your community, and putting together a proposal that allows you to execute on this work.

If you're looking to grow your work with philanthropic support, here is how to get started:

1. Start by listening

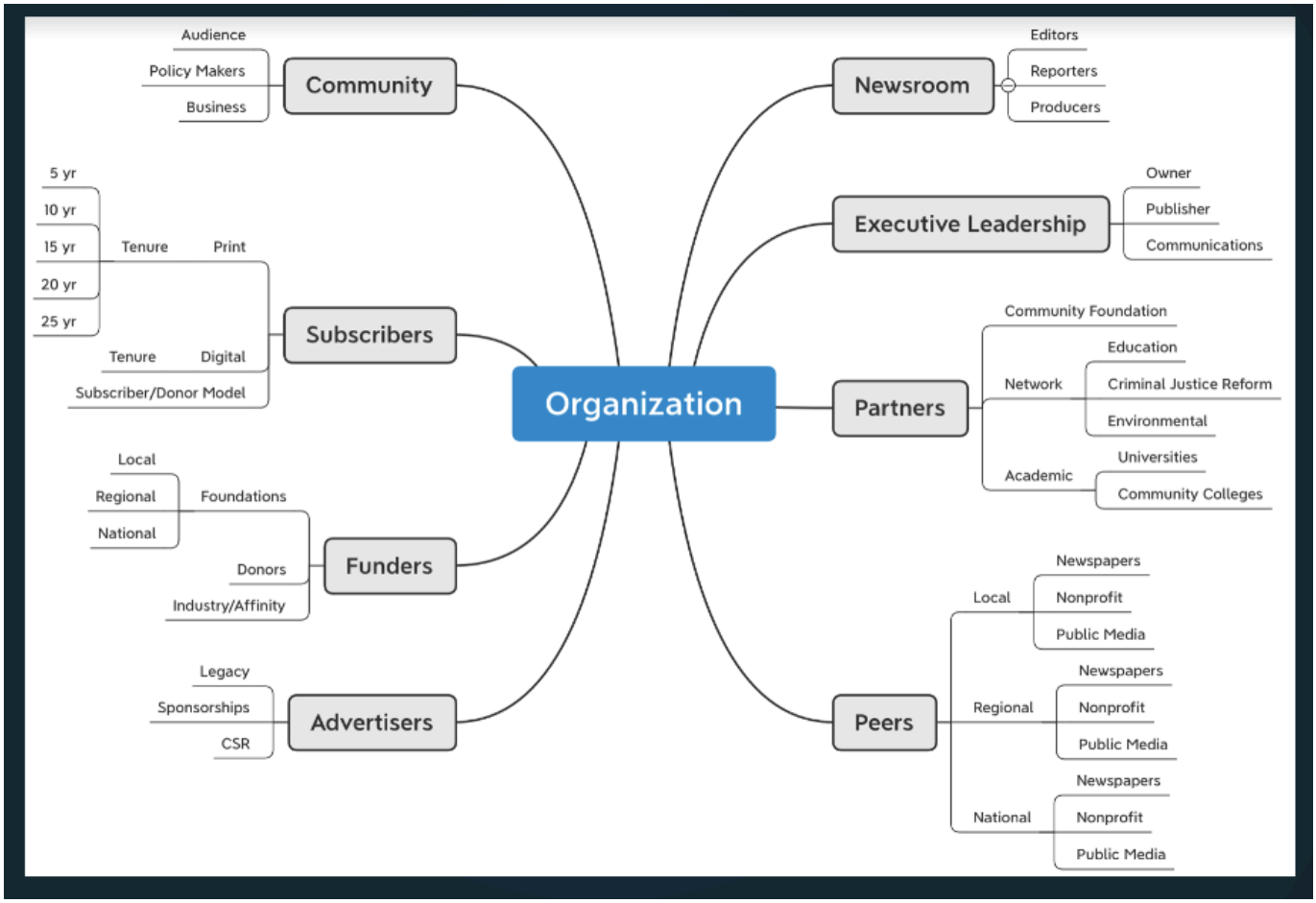
One of the first things that Frank Mungeam, LMA, teaches for the Lab is that newsrooms should start by listening. If you haven't conducted surveys of your audience or readership, starting before you talk to funders is a good idea.

- What are the biggest challenges the community faces?
- Do they see local journalism helping to address those problems?
- How do they consume news?

If you have answers to these questions, you can better develop a project proposal that will have a direct impact on the needs of your community.

2. Develop a list of funders in your community or topic to start having conversations with

Also known as creating a network map, get all your collaborators together and brainstorm all the businesses, advertisers, and civic leaders that you know. This will take some time, but it shows you the potential for people to fund your journalism or help tell your story. Here's an example of how to do this below:



3. Brainstorm a project proposal

Keeping in mind the community listening and the reporting your collaborative members have done, what is a proposal that has real impact:

- Can you cover an issue with a shared journalist among the partner newsrooms on a topic such as child welfare or mental health?
- Is there a series of community events you could do to grow engagement? Is there a need for collaborative members to improve their tech stacks with more training and funding?
- Is there an internship program where you can develop the pipeline for young journalists?

All of these examples are examples of funded projects that collaboratives supported by LMA have received funding for. These proposals take time to develop after conversations with the audience and conversations with the funder. And they are all projects that drive measurable impact.

Don't just go to a funder and say: 'we need money for what we do,' *show* the work you're doing, explain it, and add some engagement layers. Consider giving the project a title just like you would a story to help funders connect with it.

4. Develop a pitch deck

These pitch decks follow a simple template that serves as the story for the project:

- What's the problem
- Who are the audiences we seek to serve
- How can journalism respond
- What are the resources needed
- And what's your track record of impact

 **Here is a template of a pitch deck that you can customize to develop your pitch.**

If you are looking for inspiration from previous cohorts, check out this recap from last year's cohort Pitch Day.

If you want to learn more about the best practices and strategies for sustaining journalism project through philanthropy, you can download the free LMA industry report "Pathways to Philanthropy."

Branded and sponsored content

More and more businesses and brands are turning to content marketing to connect with their audiences, according to a 2022 study from Borrell Associates. Put yourself in your audience's shoes, would you rather read a well-researched article on the topic of energy efficiency for your home sponsored by a window company? Or would you rather look at an ad?

Branded content can be an effective way for news collaboratives to bring in revenue for several reasons:

- News organizations can work to develop the content with the advertiser, instead of just accepting a banner ad.
- It may be easy to find banks, universities, local nonprofits, chambers of commerce, who are very much invested in the topic your collaborative is reporting on, which means they will want to support your work because it aligns with their mission.

- Advertising revenue often has fewer restrictions on how the money is spent than grants from a foundation, or tax-deductible donations. Many collaboratives we've worked with often struggle to find funding for project managers, because their work isn't as focused on a specific reporting topic.

Why would companies want to partner with a collaborative? There are a few benefits for them:

- They know they are reaching a dedicated audience that is interested in the topic.
- Through collaboratives they get to advertise with multiple news outlets at once, which means less paperwork, more reach, and more impact.

Steps to get started with branded content as a revenue source:

1. Poll the group to see if the newsroom or collaborative is comfortable moving forward with branded content.

a. Here are some ways to get the group aligned: Have a guest speaker talk about branded content initiatives they have done. You can also work on parameters for the campaigns, such as how they are labeled and what disclaimer language is used to note that the content is advertising.

2. Make a list of local and regional advocacy groups, businesses, universities, etc., who are aligned with your mission.

3. Come up with some informative topic ideas that align with your mission. Here's some examples:

b. If you're focused on climate change, local businesses such as window companies, solar companies, or other energy efficiency companies may be interested in partnering with you on a campaign. They could sponsor a series on home energy efficiency.
c. If you're focusing on seniors and caregiving, assisted living facilities could sponsor a series on how to know when it's time for a loved one to transition to being cared for in a facility.
d. If you're focusing on housing solutions, consider having a bank or mortgage lender sponsor the content.

4. Identify who will be pitching to businesses. This could be a project manager if they don't have a strong hand in the reporting and editing on the topic to avoid any conflict of interest. You could also have an existing salesperson on the staff sell it on behalf of the group.

The last step to selling would be to structure the package in such a way that you cover your costs for the work and you bring value to the advertiser.

Here are two resources that you can use for your own revenue building:

[Revenue estimate calculator:](#) a calculator you can utilize to estimate the revenue you can bring in with branded content.

For example, assuming you have 10 local markets in a collaborative, and you sell one campaign on a series topic (education, climate, listed above) estimated at a $500 cost for freelancers to complete the series. If you price that campaign at $2,000 a month across all the collaborative (keeping in mind the total audience for all members), you can generate $15,000 in monthly revenue. This calculator is adjustable, so play around with it.

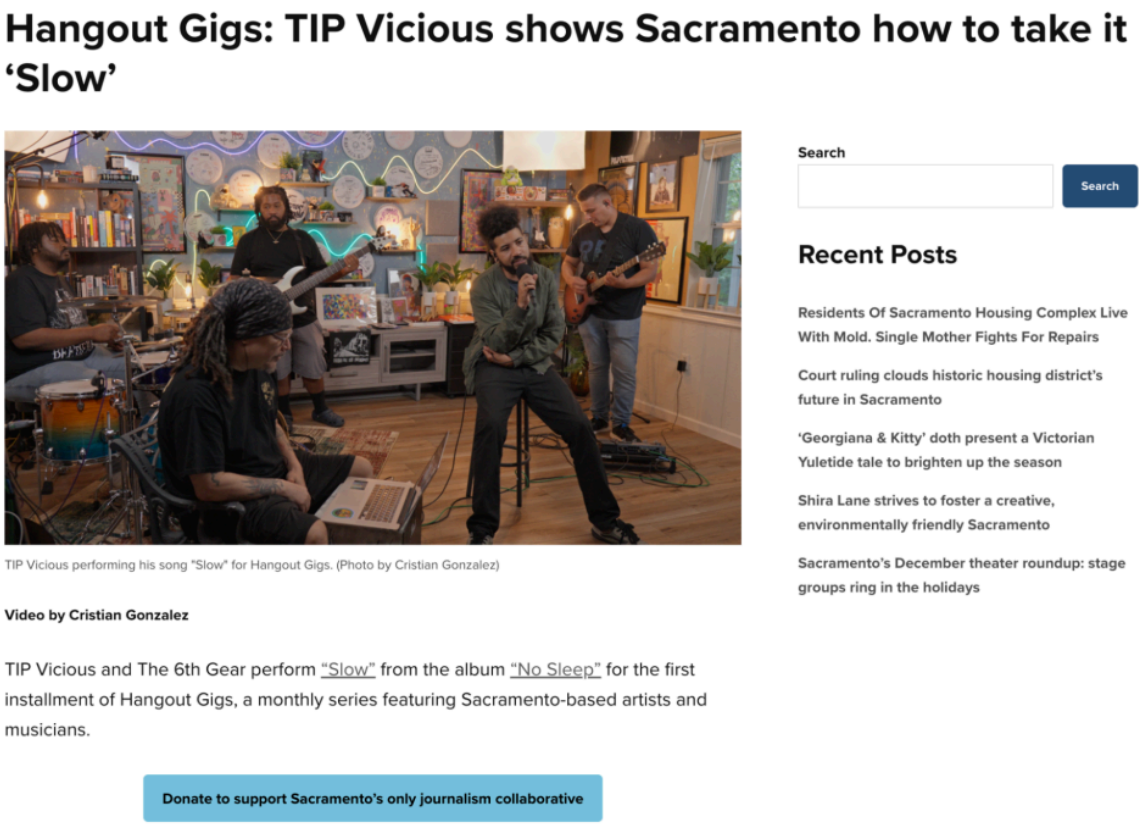
[Branded Content Playbook:](#) **ten steps and four weeks to launching your new revenue stream**



Collaborative events as a revenue stream

This year, more and more publishers have revisited events in earnest, and are seeing results both in the virtual and in-person space.

Solving Sacramento, a collaborative made up of a diverse group of publishers in the Sacramento region, found success in launching two in-person events series — one focused on their city's housing crisis and the other on local music. "Hangout Gigs: Live." includes first a live interview recording with the featured Sacramento band and the host of Solving Sacramento's arts and culture podcast in front of the audience.



Hangout Gigs: TIP Vicious shows Sacramento how to take it 'Slow'

TIP Vicious performing his song "Slow" for Hangout Gigs. (Photo by Cristian Gonzalez)

Video by Cristian Gonzalez

TIP Vicious and The 6th Gear perform "Slow" from the album "No Sleep" for the first installment of Hangout Gigs, a monthly series featuring Sacramento-based artists and musicians.

Donate to support Sacramento's only journalism collaborative

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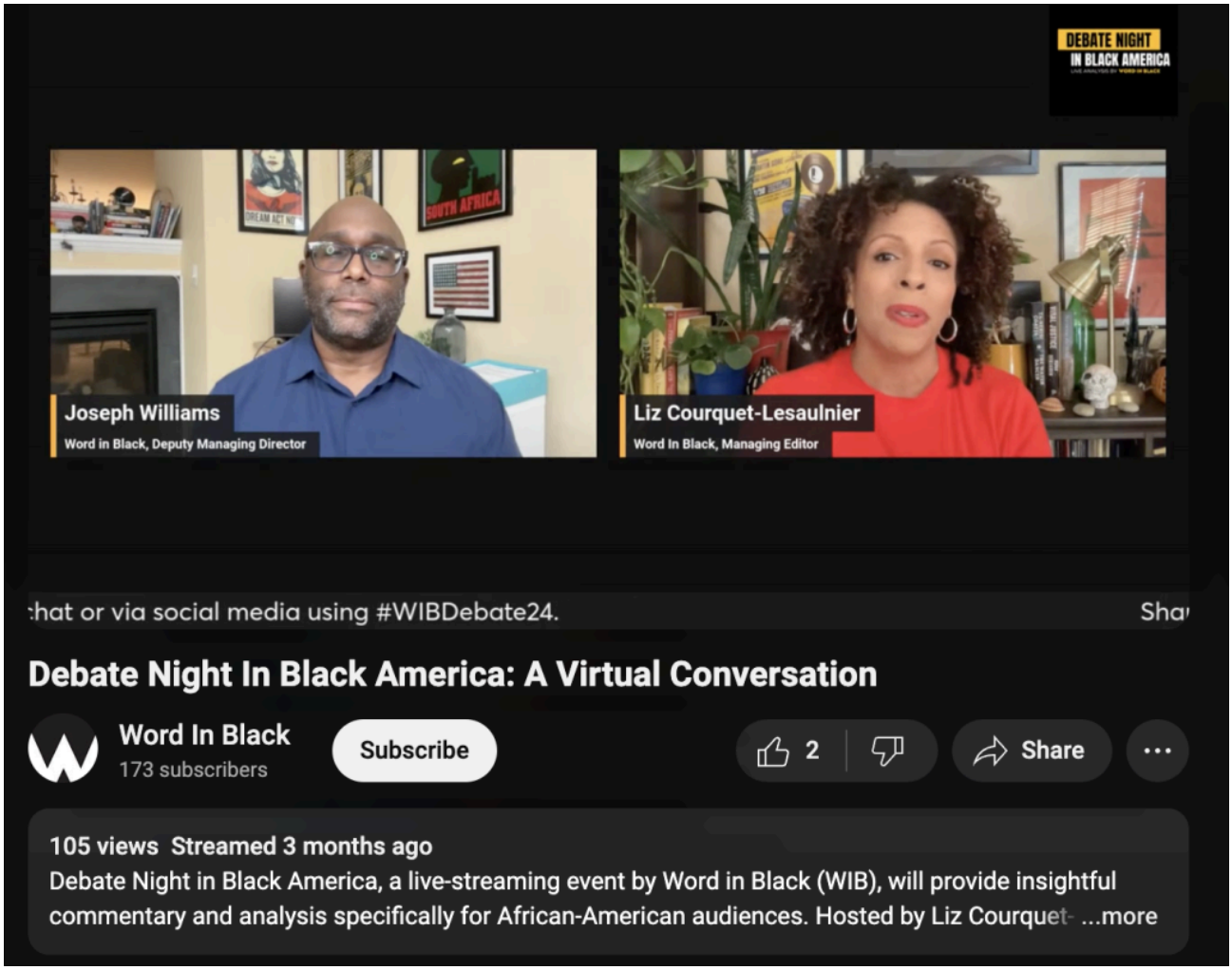
Court ruling clouds historic housing district's future in Sacramento

'Georgiana & Kitty' doth present a Victorian Yuletide tale to brighten up the season

Shira Lane strives to foster a creative, environmentally friendly Sacramento

Sacramento's December theater roundup: stage groups ring in the holidays

The collaborative charges for Hangout Gigs: Live (so far they have tried out $15 and $12 ticket prices), and have raised about $700 in funds from ticket sales from the first two events. They consider these micro-fundraisers a great way to generate some revenue, while also creating unique editorial products and engaging with community members.



Word In Black, a collaboration including 10 Black newspaper publishers across the U.S., hosted a virtual event on the night that Vice President Kamala Harris debated president-elect Donald Trump. Moderators interviewed Black politicians and prominent leaders about what they hoped to see that night.

How to make your event launch plan

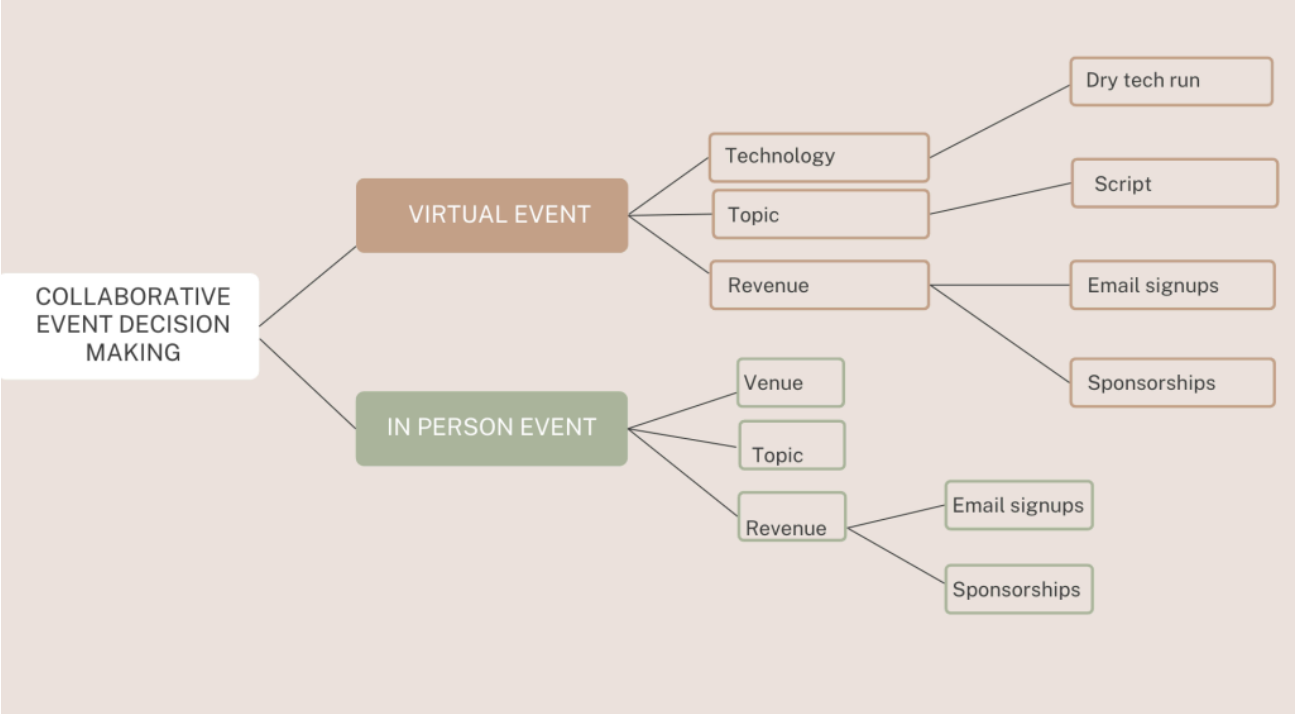
If you are looking to launch an events plan, here is some advice on how to get started:

1. **Decide if the events will be virtual or in-person.** If you are a geographic-based, in-person events can be a benefit for engagement and revenue. If you are identity-based or topic-based, you can easily do virtual events.
2. **Decide on a topic.** Don't shy away from hard news topics, or topics that are relevant to your community. News is Out's first event in 2025 will likely focus on the impact of the incoming Trump administration's policies on the LGBTQ+ community. The group will also do several events on health.
3. For both in-person and virtual events, **planning a script and run-of-show is a good idea.**

Here is a copy of the script for News is Out's virtual event. You should also schedule a tech run-through and dry run with any moderators.

4. **Decide on a revenue route.**
    1. Can you raise money through ticket sales, even small amounts?
    2. Can this event be sponsored by a community organization who cares about this topic, or a company?
    3. Can you grow your first-party data and email list by requiring registration for the event? News is Out set up virtual registration for its event and brought in more than 100 new emails.

For more resources on how to manage events, here is a decision-making chart with a list of steps you can take to plan for your first event.



How to build collaborative events to engage college students

Your panel must be engaging, interesting and informative to draw college students. Our team spent a great amount of time discussing who needed to be on the panel and their focus. Here is what we decided:

- Have local experts on the topic. For us, it was a legal expert with the non-profit Kansas Legal services. They have an attorney who specializes in housing

issues.
- We had a counselor from the Consumer Credit Counseling talk about budgeting and credit concerns.
- Have a student who has experienced the issue on the panel.
- Moderator: Have a staff member or student from the college act as moderator.

Creating questions for the panel:

- Questions/topics can be vetted through emails but should be crafted by the college students helping plan the event.
- Five-six questions are sufficient for an hour event
- Allow time for attendees to ask questions

Target your materials to a college audience with images and wording that is concise and direct, as well as highlight free snacks or other incentives for attendance.

Marketing the Event Checklist	**Done**
Use Instagram or social media popular with college students	
Send email blasts	
In-Kind ads in college newspaper and collaborative partner publications	
Share social media with collaborative partners for their use	
Reach out beyond campus with fliers to others interested in issue	

Tips for a successful event:

- Allow plenty of time to plan and choose the location and invite expert panelists. People are busy and it's hard to book someone at the last minute. Also, meeting spaces in high-traffic, visibility areas on college campuses are at a premium so book early!
- Snacks are a great draw.
- Ask the panelists if they can stay after the event for more private conversations. We found people who stayed after wanting to talk privately.
- Having photos from the event was valuable but also taking videos too. including video shorts of advice and suggestions from the panelists would

have been beneficial for later use on social media.

Read more about how to put on successful events for college students here.

How to build a collaborative news fair to engage new audiences

If your collaborative wants to connect with a new and previously unengaged audience or one that feels overlooked, this section will guide you in creating, marketing, and hosting the event. An event like a News Fair is an excellent opportunity for all members of the collaborative to get involved, whether through planning, marketing, research, or attendance.

The Fall News Fair was an engagement event organized by the Wichita Journalism Collaborative (WJC) to connect with the Oaklawn community in south Wichita that is unfamiliar with or disconnected from local media. Many residents have expressed feeling “forgotten," prompting the WJC to create and host the Fall News Fair in November 2024.

The concept and format for the event were proposed by the founder and editor of Planeta Venus, an online Spanish radio station, podcast, and newspaper that serves Wichita’s Spanish-speaking community. Many, but not all who live in the community, speak Spanish or are bilingual.



Planning the News Fair

Create a planning team to design and host the event. We made sure that the collaborative partner who suggested the Fall News Fair was involved from start to finish.

Planning Task list	Done
Choose a location. Consider one that has a kitchen, tables and chairs.	
Choose a date and time.	
Contact collaborative partners and make them aware of the event, and details and encourage participation. It's a good opportunity for reporters to engage.	
Hire a singer or some type of entertainment to draw and engage the community to attend.	
Invite non-media partners to add variety and offer information about community resources. This is who we included: • A non-profit health clinic that serves the underserved and uninsured. • A coalition of Spanish-speaking Latinx families, interpreters, healthcare providers, community leaders, and university faculty and students whose mission is to improve health equity for Spanish speakers and speakers of Indigenous languages in Kansas • A local accredited technical college.	
Order food based on estimated attendance.	
Make sure you have translators, if needed.	

Marketing to do list	Done
Fliers for nearby businesses	
Use flier art in social media	
Distribute fliers at a nearby school, if permissible. A news fair is a family-friendly event and this is an excellent way to reach the community.	
Have a partner's social media manager create social media posts for all partners to use	
Ask partners to run spots on radio and TV and gift-in-kind ads	

We created fliers in English and Spanish because many of the people we were reaching out to were bilingual or Spanish speakers.



A news fair offers an excellent opportunity to get to know a new community, hear concerns and discover story ideas. One way to make this connection is through a drawing that asks people to share concerns and their news sources when they fill out the entry form.

For our event, we had Thanksgiving Feast Baskets, but you may have an idea that resonates with the season or the community.

For our feast baskets we filled five turkey pans with:



- Non-perishables like potatoes, vegetables, desserts, rolls
- Card games and a craft
- A grocery store gift card so they could purchase a turkey or other perishable items.

Lessons Learned

- Entertainment was valuable and drew people to attend. We hired singer Daisy Sosa who is well-known and bilingual and engages attendees.
- It's valuable to have other agencies participate. We had health agencies and a tech school participate. Attendees spent time learning about their work. One agency handed out dental kits with a toothbrush, floss and toothpaste.
- The Turkey Feast Basket was a fun and very useful way to engage with people and find out what stories they would like to see reported.
- Translators were important for our event. Three partners staffed their tables with bilingual people.
- Connecting and interacting with attendees is key. Turkey basket drawing was helpful but consider other ways. Perhaps give people a card that is stamped by each organization they visit, and they turn it in to enter the raffle or receive some type of swag like a water bottle.
- Start planning for another event with the community!

Read more about the Wichita Collaborative event and how to replicate it.

How to build collaborative candidate forum events

A candidate forum offers an opportunity to inform voters on critical issues and bring people of diverse political beliefs together. It also provides your collaborative an opportunity to engage all its partners, draw in a new audience, and increase awareness of its work.

Location Needs Checklist	Available?
Centrally located or within the candidates' district	
An auditorium with a stage is ideal.	

Is there adequate parking	
Is it handicap accessible	
Technology needs met – microphones, sound system adequate. Visit and test the week before.	
Is there someone to run the technology	
Security on-site during the forum	

Marketing Checklist	Done
Design (or hire a designer to create) print and social media materials and gift-in-kind ads.	
If having more than one forum: create materials that have a distinct look for each district.	
Print postcards and fliers	
Have Spanish-language translations of materials	
Mail postcards to key people who you'd like to attend	
Write an advance article that can be shared by all collaborative partners	
Partners can promote the forums through gift-in-kind ads	

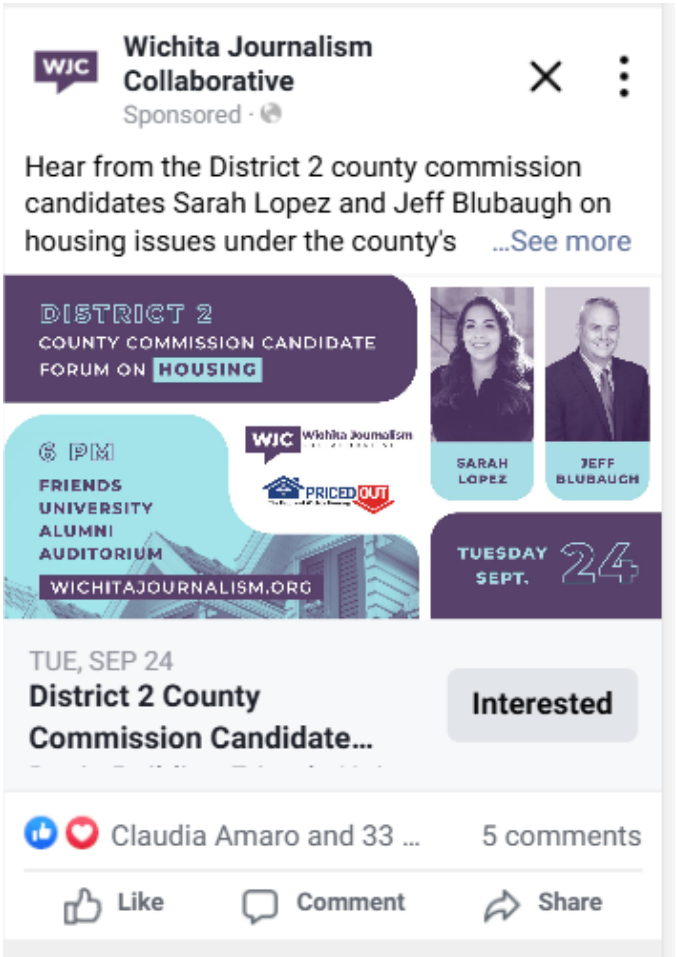




Facebook Ads

Paid Facebook ads are a good way to reach your audience. There are some aspects to consider when they are about an election issue:

- There are restrictions on ads during the election period related to social issues and elections. Facebook must approve ads before they run them. Ads often are rejected at first, but don't give up – keep reapplying. We found our ads were approved after two or three rejections.
- We found it beneficial to focus the ad's wording on housing issues and to avoid using words like candidates, election, or forum.
- Facebook ads did not let us use ZIP codes for targeting but we could place a pin on a location.



Creating the Questions

- Give significant time to creating the questions for the candidates to include everyone in the collaborative who wants to be involved.
- Ask partners to research and submit housing questions for the forums to a central person / doc.

- Then, create a team of no more than five, including reporters who have covered housing issues, to review and refine the questions.
- If you have more than one forum, consider having different questions for each.
  - Two reasons for this:
    1. There may be different vital issues in each district.
    2. If candidates scheduled for the second forum come to the first forum to get an idea of what to expect it prevents them from preparing and creating an unfair advantage.
- Allot plenty of time for forum attendees to ask questions.



Create A Run of Show

This is critical to the event and should be shared with all collaborative partners participating in the forum and the candidates. It should be followed to ensure flow and prevent it from running too long.

Example run of show:

6:05 p.m. Welcome from WJC coordinator.

6:07 p.m. Candidates will have 2 minutes for opening statements. One minute to answer each question. Each candidate will have 30 seconds to follow up as needed. At this time, we estimate 6 questions.

6:13 p.m. Questions from moderators. Moderators will be members of the WJC. Candidates will have 1 minute to answer each question. There will be 30 seconds allowed for follow-up, as needed. Approximately six questions.

6:55 p.m. Questions from the audience. People will line up and ask questions at the microphone.

7:15 p.m. Forums conclude. Candidates to give closing statements. 1 minute each. Statements will be in reverse order of opening statements. Thank everyone for coming.

Coverage of the Forums

Collaborative Forums offer an excellent opportunity for collaboratives to work together and share the lift of election coverage.

For TV:	Done
Consider live coverage on the evening news in advance of the 6 p.m. forums.	
Live streaming is an excellent way to engage people who can't attend.	
For Print:	
Partners can write about each in the days after (District 3 and District 2 and the WJC intern did a wrap-up piece.)	
If you have a Documenters they can write and share notes with everyone in the collaborative.	
Engage a photographer from the college newspaper/collaborative member to take photos. They can be shared later on social media.	

What we learned from our two candidate forums:

- **New Audiences were engaged:** The forums brought together people with differing political views and affiliations. The forums introduced new people to the work and partners of the Wichita Journalism Collaborative. Conversations between journalists and attendees occurred before the forums and for about 30 minutes after each night. The League of Women's Voters served as timekeepers and connected us with a new group of people who were interested in our work.

- **Live Streaming by KSN-TV increased the audience:** Our TV partner livestreamed both forums. About 180 people total watched while they were live. For video views, KSN had 874 views on the videos on its site plus 287 views on YouTube for a total of 1,161.

- **It was very beneficial to tour the auditorium and meet the tech staff ahead of the event.** This helped KSN-TV prepare to livestream the forums. They sent a team of four to check everything out.

- **Engage students if possible!** The students in Dr. Russell Arben Fox's POLS 100, American Government course at Friends University attended both forums for extra credit. The students participated by asking questions about housing issues that related to their experiences. Some wrote summaries of the event and the candidates.

- **Great collaborative reach:** The benefit of hosting election forums is that it provides all partners an opportunity to be involved and expand their reach and impact.

Read more about the Wichita Collaborative candidate forum events.

How to build collaborative virtual events to engage community

Overview: Our Step-by-Step Process

From November 2024-March 2025, Everyday Climate Champions and Proximate worked collaboratively to plan and execute the community engagement event. Below is the outline of our process:

Month 1 and 2:

- Held a planning meeting to finalize the projected date, platform, and format.
- Started to outline responsibilities between each partner
- Discussed usual approaches and how much flexibility is available
- Discussed preferences and requirements or processes
- Hashed out policies and ethical concerns
- Decided on work plan for our collaboration with due dates
- Set up shared folders/Slack channel

Month 3 and 4:

- Finalized revised event date and speakers.

- Started to develop an invite list (target of 30 from each partner, including other journalistic sources and contacts in the field).
- Developed a social media and newsletter strategy.

Month 5:

- Continued developing invite list.
- Developed and distributed outreach materials and assigned email responsibilities.
- Reviewed RSVPs and outreach progress.
- Determined topics and questions for webinar discussion.
- Held a prep session with speakers

Month 6:

- Created and reviewed materials for use during the webinar.
- Finalized the Take Action Guide.
- Co-hosted the webinar (March 11).
- Edited the transcript to focus on the speakers' points.
- Co-wrote and sent a follow-up email to registrants with event recap and the Take Action Guide.
- Conducted a debrief meeting.
- Compiled and submitted this collaboration toolkit.

Helpful Tools and Practices

As we collaborated, we used a number of tools and techniques that facilitated our success:

- **Collaborative folders:** Used for storing all shared assets, with clear subfolders for outreach, event design, and follow-up.
- **Regular check-ins:** Planning meetings and informal check-ins (via phone and Slack) helped keep communication open.
- **Flexible planning:** Recognized that speakers' schedules/other conditions may change and planning must adapt to that.
- **Manage expectations of participation:** We expected about half of registrants to actually participate live, and this was about accurate. During the webinar, we encouraged chats and questions, and participants were eager to do so.
- **Planned run-of-show agenda/script:** This minute-by-minute breakdown was essential for smooth event facilitation. It maintained a core agenda but left room for spontaneous conversations and community questions. [Example: while breakout rooms were planned for the event, participants opted in real-time to

converse as a full group.] During the webinar, we used Slack for real-time communication behind the scenes.

- **Distribution of post-event resources**: We decided to edit the webinar transcript to focus on the speakers' comments, as opposed to distributing the full recording. We sent it to all registrants, along with the Take Action Guide that offered additional resources. The edited recap and Take Action Guide were also posted to select social media (e.g., LinkedIn).

Outreach Materials

Our process included co-development of the event announcement, social media content, and a Take Action Guide. This ensured alignment and shared ownership over the substance and promotion of the event. Those materials appear below, and can be used as sample for future reference:

- Event announcement
- Social media posts and newsletter language (text + images) - these were variants of the event announcement
- Event promotion graphics



Event Planning and Execution Materials

We co-developed a number of files that helped us produce the event: before, during, and after it. You can copy them below and edit them to make them useful for your events!

- Planning meeting agenda/notes with speakers
- Spreadsheet of intended invitees
- Webinar agenda and script
- Brief webinar slidedeck, including input from speakers
- Webinar edited transcript (recap)
- Take Action Guide
- Follow-up email to registrants

To learn more detail about the Proximate and Everyday Climate Champions event planning and process, read more here.

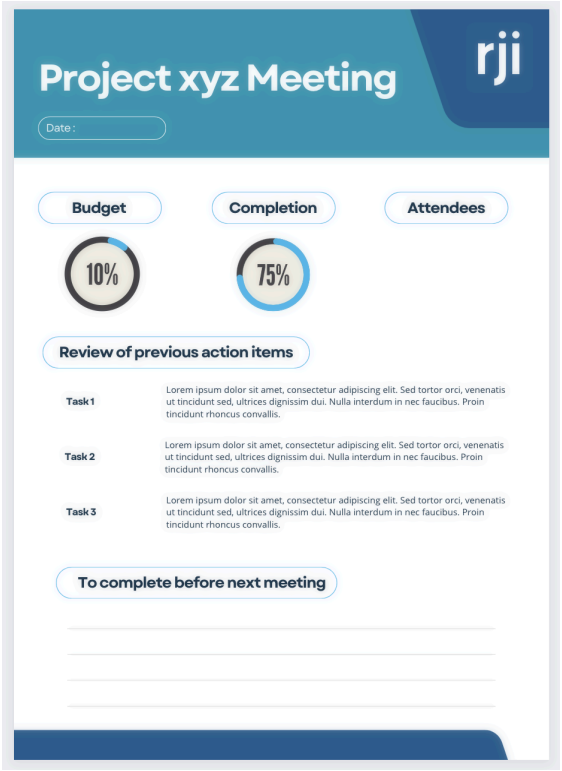
Project management

Project management is a key piece of your collaboration to ensure it functions smoothly and is successful. Project managers help the team meet deadlines, communicate clearly and identify challenges before they become obstacles to success.

Resources for the project manager:

Collaboration kickoff worksheet: So you've found some potential partners, now what? We suggest setting aside at least one day to have real discussions as you work your way through this worksheet to make sure everyone is on the same page with expectations around workload, funding, values, mission and timeline. Canva version. Google docs version.

Asynchronous brainstorming template: Want to come up with ideas as a group and have everyone contribute to the conversation even if they aren't all available to meet on zoom or in person? Here's a template by Sisi Wei to do so.



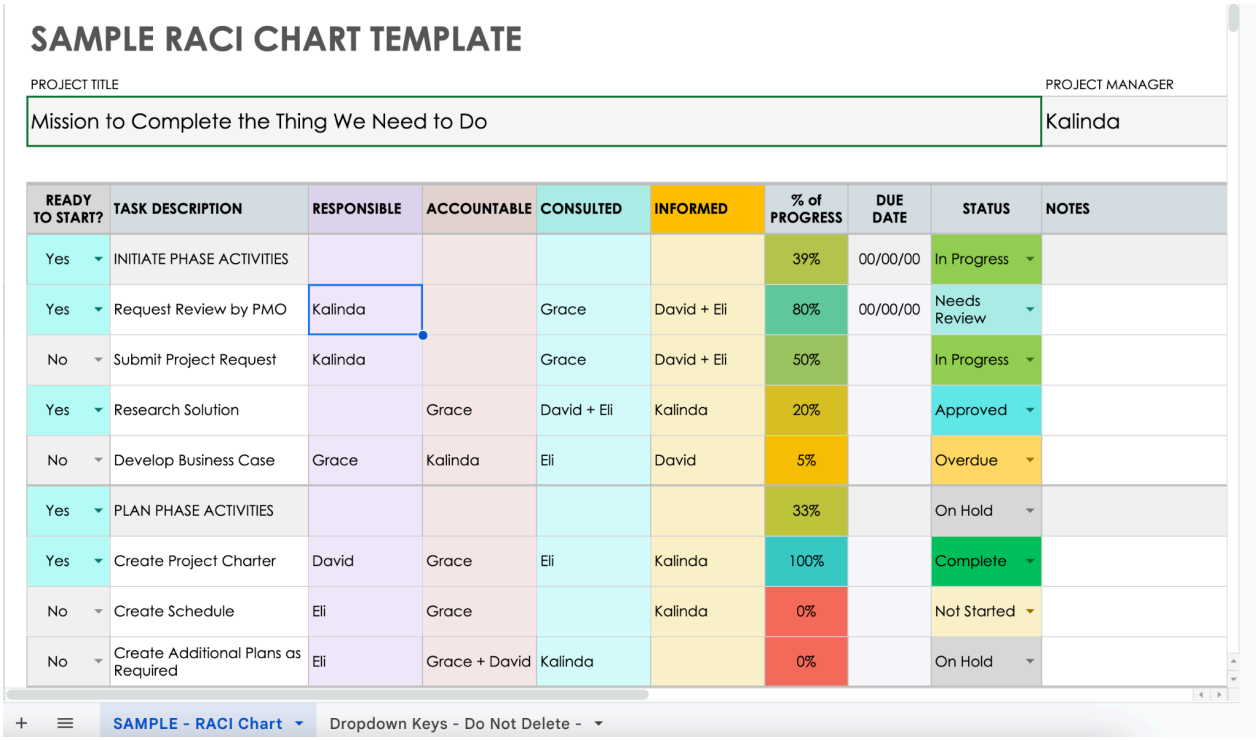
Project meeting template (including updates on budget, previous assigned tasks, action items) Copy and customize for your project to keep on track! Canva version. Google docs version.

Weekly calendar for drilling down into weekly deadlines according to the medium/type of work: reporting, social strategy, fundraising, pitching to places to republish.

Ready to collaborate checklist Go through this checklist with your group to make sure you're ready to kickoff your project.

RACI templates We love these RACI templates from smartsheet which can help you customize and organize the tracking of your collaboration from your project roles to milestones and action items.

We copied this one that focuses on action items and milestones to google sheets to share with everyone involved in the project for live updates across collaboration partners. Copy this google sheets template to use it!



SAMPLE RACI CHART TEMPLATE

PROJECT TITLE: Mission to Complete the Thing We Need to Do

PROJECT MANAGER: Kalinda

READY TO START?	TASK DESCRIPTION	RESPONSIBLE	ACCOUNTABLE	CONSULTED	INFORMED	% of PROGRESS	DUE DATE	STATUS	NOTES
Yes	INITIATE PHASE ACTIVITIES					39%	00/00/00	In Progress	
Yes	Request Review by PMO	Kalinda		Grace	David + Eli	80%	00/00/00	Needs Review	
No	Submit Project Request	Kalinda		Grace	David + Eli	50%		In Progress	
Yes	Research Solution		Grace	David + Eli	Kalinda	20%		Approved	
No	Develop Business Case	Grace	Kalinda	Eli	David	5%		Overdue	
Yes	PLAN PHASE ACTIVITIES					33%		On Hold	
Yes	Create Project Charter	David	Grace	Eli	Kalinda	100%		Complete	
No	Create Schedule	Eli	Grace		Kalinda	0%		Not Started	
No	Create Additional Plans as Required	Eli	Grace + David	Kalinda		0%		On Hold	

SAMPLE - RACI Chart | Dropdown Keys - Do Not Delete -

Newsroom resource requirement template: Plan and track your newsroom resources allotment & needs with this template.

Promotion timeline template: Plan your collaboration promotion across teams and newsrooms with this template.

Not into Google? Other digital tools for instant collaboration updates across teams:

- Monday
- Wrike
- Smartsheet
- Miro

Why we built this toolkit

As editorial collaborations become increasingly common, more and more community-focused newsrooms are looking for ways to effectively partner with other media and civic organizations. But those partnerships come with a very real cost – of time, resources and effort – that requires careful planning and prioritization from every outlet involved.

In spring 2023, the Donald W. Reynolds Journalism Institute and the Institute for Nonprofit News interviewed 39 community-serving newsrooms to better understand their specific needs to participate in journalism collaborations. Those conversations, along with survey information and real-world experience, are the foundation of this toolkit.

A common theme that emerged was how challenging it is to design collaborations that move beyond simple republication agreements to more meaningful editorial co-creation.

“It's like kids in a sandbox,” said Dee J. Hall, editor-in-chief of Floodlight. “They don't have to share the truck or share the pail ... And those (collaborations) can work.

“There's an advantage of playing side by side. … Each (outlet) can keep their own style. But then there isn't necessarily a throughline through the project, because no one can make that throughline. … It would be better if there was a throughline leading to something. But I understand why you do that. Because it is easier, right?”

Collaboration is an ongoing process, one that demands the same attention and effort as your reporting and editing. Use this toolkit to unlock the benefits of collaboration, to steer clear of the pitfalls, and put the process to work for the communities you serve.

What we learned from our interviews

121 newsrooms applied to be interviewed about collaborations, 39 of which we got to speak with directly, and the rest we surveyed through a Google form. We chose a variety of outlets across different platforms, both nonprofit and for-profit, ranging from local (44% of interviewees) to state (23%), regional (15%) and national (18%). In these interviews we discussed what collaborations mean to them, the main challenges of pursuing one and what newsrooms feel they need to make collaborations more impactful.



The newsrooms we spoke with identified two main challenges to successful collaborations: project management and funding.

Funding challenges identified by interviewees:

- How to collectively fundraise with partners for a project
- How to make a collaboration bring in sustainable funding
- How to bring in funding to be able to make space to do the collaboration

Project management challenges identified by interviewees:

- How to make sure your missions and values align with your collaboration partners
- How to define what the collaboration is as a group from the beginning
- How to navigate decisions that affect everyone involved
- How to know what your deal breakers are
- How to ensure collaborations serve communities
- Balancing collaborations with other work

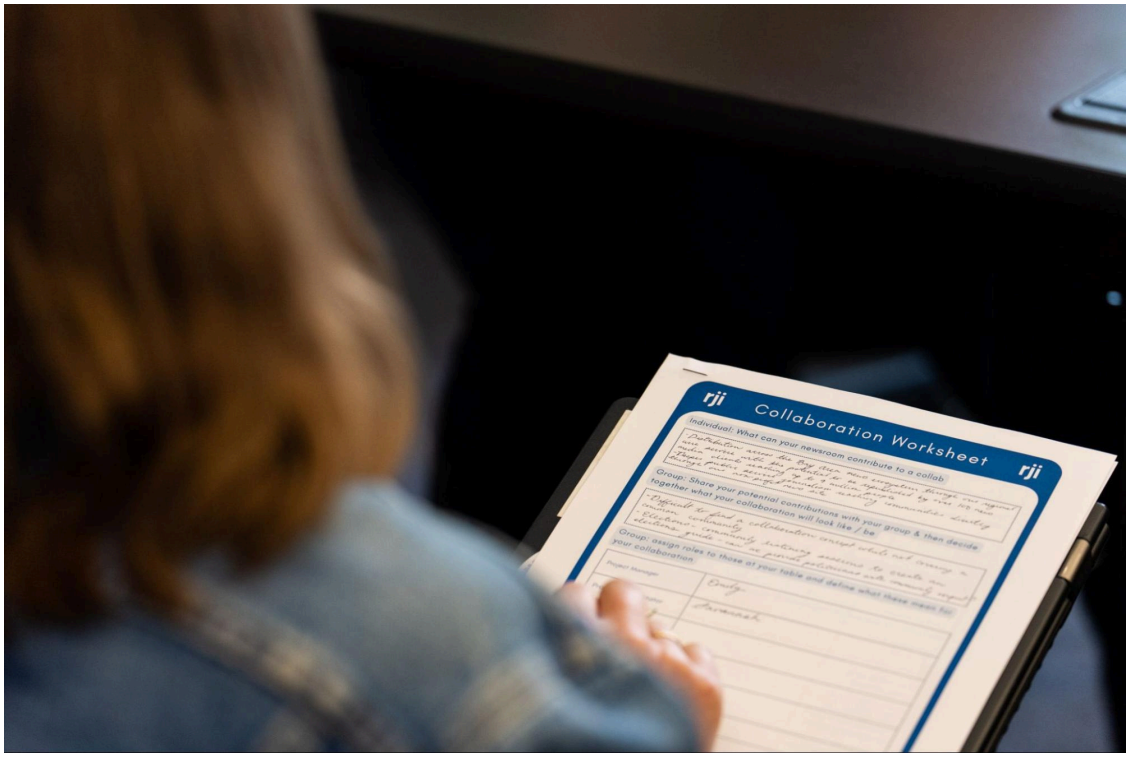
And much more.

We took these takeaways to the Collaborative Journalism Summit where our workshop broke attendees into groups who went through our worksheet together. This worksheet was built with the challenges newsrooms identified for us in mind.

The worksheet helped each group identify what their collaboration would look like, what their individual contributions would be, what their mission and values (collectively) are and more.

Participants gave us great feedback on how this process made them have the important (and sometimes uncomfortable) conversations at the beginning, rather than

mid-way through a collaborative project or only when challenges cropped up. Having these conversations at the beginning leads to less hurdles later to overcome as a group, paving a smooth path forward for everyone collectively.



A Collaborative Journalism Summit attendee works on the collaboration worksheet with her group. Photo by Will Allen-DuPraw

We love feedback

We built this toolkit to be useful, actionable and helpful in building successful and sustainable collaborations. We'd love to hear your feedback as you use it - what should we add? What else can we help you with? Let us know.

Find Kat Duncan at Duncank@rjionline.org and Bridget Thoreson at bridget@inn.org.