

Collab Canvas Toolkit

An Intentional Method for High-Synergy Partnerships

Typically, two parties collaborate without taking the time to sit down, brainstorm, and thoroughly analyze the most effective ways to work together or explore the available options. Instead, they often rely on instinct, which frequently results in suboptimal outcomes.

What is Collab Canvas?

Collab Canvas is a collaborative method designed to enhance synergy between people, teams, and organizations by identifying mutual needs, offerings, and ways to collaborate effectively. The toolkit encourages co-creation and prioritization of actionable ideas, making it an essential resource for initiating impactful projects.

Objectives:

1. Foster meaningful collaboration between diverse stakeholders.
2. Clarify individual and mutual interests toward a shared purpose.
3. Prioritize efforts for maximum impact and feasibility.

Why is it important?

Collab Canvas ensures transparency and alignment between collaborators, reducing ambiguity and fostering trust. This method sets the foundation for effective partnerships, whether in small teams or larger organizations.

Collab Canvas <i>An Intentional Method for High-Synergy Partnerships</i>		Facilitated By: Time-Focus keeper::	Player A:	Player B:	Date:
		Iteration # Remember revisiting as the partnership evolves			
How can I collaborate? What can I offer?		Synergy Zone Win-Win.Win  Transition Lab Is this something we can only achieve by acting together?		How could you collaborate with me? What I need?	
How could you collaborate with me? What I need?				How can I collaborate? What can I offer?	
PLAYER A				PLAYER B	
Prioritizing process Score each option 1 (low) to 5 (high)		OPTION A	OPTION B	OPTION C	
• Mutual Interest and Motivation • Dual Benefit (Multifocus) • Significant Progress • Network Availability • Impact • Equity and Power Balance • Deadlines • Learning Potential • Scalability • (Other) • (Other)					
TOTAL					
		First co-created pilot project The first pilot should be small enough to start immediately and meaningful enough to prove the partnership is real. Guide your deliberation with the following criteria: • Quick, short term Implementation • Low budget and effort • Learning Potential			
		First co-created smart GOAL The first action that proves this collaboration has begun. S — Specific, M — Measurable, A — Achievable, R — Relevant, T — Time-bound			

Created by Transition Lab based on the work of Andrés Robles — <http://www.transitionlab.cl>, tested and pivoted at Fundación Somos Agua — <https://www.somosagua.cl> and inspired by Arco Luna Changemakers Collaborative Network — <http://www.arcoluna.net>

How to Use the Toolkit

1. Set Up Your Workspace:

If you are meeting virtually:

Access the Collab Canvas template online (via the provided [Google Drive link](#)).

- Create an editable copy by clicking **File > Make a Copy** in your Google Drive.

If you are meeting in person:

Print the toolkit (via the provided link) or draw it on a bigger paper or board.

Bring sticky notes or markers for participants to write their inputs.

Prepare a large, flat surface to arrange and organize the materials collaboratively.

2. Define Participants:

Identify Player A and Player B.

Assign roles to each participant based on expertise or project involvement. Important roles are the facilitator, the Player A writer, and the Player B writer, and additional roles like the reviewer, observer, and time-focus keeper.

- **Facilitator:** Guides the process, ensuring that the discussion stays focused, productive, and within the set timeframe. They encourage active participation, clarify any uncertainties, and mediate disagreements to maintain a collaborative atmosphere.
- **Player A Writer:** Responsible for accurately capturing the contributions of Player A on the canvas. They document Player A's offers, needs, and proposed collaboration methods, ensuring clarity and completeness.
- **Player B Writer:** Performs the same role as the Player A Writer but focuses on documenting Player B's inputs.
- **Reviewer:** Reviews the completed canvas to ensure accuracy, alignment of inputs, and that no key details are overlooked. Once finalized, compiles the agreements and the completed document and ensures it is distributed to all parties involved.
- **Observer:** This role is ideal for a neutral third party who can provide objective feedback on the collaboration dynamics, highlight potential blind spots, or suggest improvements without actively contributing to the canvas.
- **Time-Focus Keeper:** Tracks time AND maintains the integrity of the process sequence, ensuring the session moves through each phase in order and that one party does not dominate any section. A dual role: clock and compass.

3. Populate the Canvas:

Each player fills in their respective sections independently and simultaneously, before any discussion begins:

- **How Can I Collaborate? (What can I offer?):** Suggest ways you can work with others. Identify resources, skills, or networks you bring to the table, that you can offer.
- **How Could You Collaborate With Me? (What I need?):** Propose methods others might assist you. Outline your needs or challenges that collaboration can address.
- If meeting **virtually**, use the Post-it notes to add your inputs by double-clicking to edit them.
- If meeting **in person**, write each input on a separate sticky note so items can be moved individually to the Synergy Zone in the next step.

4. Review and Discuss:

- Each player reads their Post-its out loud, ensuring all participants understand the inputs and addressing any clarifying questions.
- Identify areas of overlap or complementarity to uncover collaborative opportunities: Where do our needs and efforts intersect most naturally?
- Move those Post-its to the Synergy Zone at the center of the canvas.
- **Apply the collaborative advantage test:** “Is this something we can only achieve by acting together?” Only items that pass this test move forward.

5. Prioritize Actions:

Select at least three options from the Synergy Zone and copy them to the Prioritizing Process section as Option A, Option B, and Option C.

Before scoring, both parties review the criteria list below and agree on which ones apply to this partnership. Cross out the criteria you will not use, but keep at least three. If you want to add a criterion not on the list, write it in one of the two custom slots at the end.

Score each option: Evaluate each option against the selected criteria below, scoring from 1 (low alignment) to 5 (high alignment). Each party scores independently, then sum or average the two scores and write the result in the canvas. The option with the highest total is your strongest candidate for the First Co-Created Pilot Project.

- **Mutual Interest and Motivation:** Is this project genuinely compelling and beneficial for both parties? Does it energize both sides equally?
- **Dual Benefit (Multifocus):** Does this option advance multiple goals for both parties simultaneously, rather than serving only one side?
- **Significant progress:** Will this produce noticeable advancement toward each party's goals? Can both parties point to real results?
- **Network Availability:** Do you have access to the necessary networks, resources, and support for this option?
- **Impact:** Does this have potential for meaningful and measurable results beyond the immediate partnership?

- **Equity and Power Balance:** Does this project give both parties roughly equal agency, risk, and credit in its execution?
- **Deadlines:** Can this project be executed within a realistic and agreed timeframe for both parties?
- **Learning Potential:** Will this generate knowledge or capability both parties can carry forward, regardless of outcome?
- **Scalability:** If this project works, can it grow into something larger or be replicated elsewhere?
- **Other:** Are there any other important criteria to evaluate on each option?

6. First Co-Created Pilot Project:

The first pilot should be small enough to start immediately and meaningful enough to prove the partnership is real. Guide your deliberation with the following criteria:

- **Quick, short-term implementation:** Can the project be executed efficiently within a short timeframe?
- **Low budget and effort:** Does it require minimal financial and resource investment?
- **Learning potential:** Will this generate knowledge both parties can use going forward, even if the project itself is modest?

7. First Co-Created Smart GOAL:

Define the first action that proves this collaboration has begun. Write one goal together, before either party leaves the room, using the SMART criteria:

- **S (Specific):** The goal is clear and well-defined. Not “we will work together” but a concrete action.
- **M (Measurable):** There is a concrete indicator of success. How will we know we achieved this?
- **A (Achievable):** The goal is realistic given the resources and time both parties actually have.
- **R (Relevant):** The goal connects directly to the collaboration’s purpose and serves both parties’ goals.
- **T (Time-bound):** There is a specific deadline both parties agree to before leaving the room.

Output

1. A completed bilateral map of both parties’ needs and assets.
2. A prioritized, co-selected First Co-Created Pilot Project.
3. A First Co-Created Smart GOAL: a specific, time-bound commitment both parties write together before leaving the room.

When to Use

- At the very beginning of a partnership, before any project is proposed, before any budget is discussed, before either party has committed to anything.
- When needing to realign an existing partnership that has lost direction or momentum.
- Revisit the canvas periodically as the partnership evolves; needs change, and the Iteration # field is there for a reason.

Why to Use

- To establish clarity and mutual understanding before action begins.
- To maximize collaborative potential by surfacing what both parties offer and need.
- To prevent the most common failure modes of unstructured partnership: premature convergence, power imbalance, and missed synergy.

Notes

- Flexibility is key: not all criteria will apply equally to every context. The two custom criterion slots allow you to adapt the prioritization process to your specific partnership.
- Let the relationship breathe before introducing the structure. Make space for small talk, for sharing your story and hearing theirs, before proposing the canvas.
- Be selective: not every collaboration request warrants a full session. Use the canvas intentionally, with partners where there is a reasonable signal of mutual interest and reciprocal attitude.
- Practice before using it in a real partnership context, even informally, even with colleagues.
- The ideas that do not become the pilot project are not failures; they are seeds. Keep a record of everything that emerged during the session and revisit it as the partnership evolves.

Collab Canvas is a versatile tool that can be applied across diverse industries, teams, and project scales: nonprofits, universities, public agencies, corporations, and community organizations. By providing a structured yet flexible framework, it empowers participants to unlock their collaborative potential, align objectives, and co-create meaningful solutions.

Remember to revisit and refine your canvas as your partnership evolves, ensuring it remains a dynamic resource for your collaboration's growth.

Collab Canvas was created by **Andrés Francisco Robles Rebolledo**, drawing from the innovative frameworks developed by Transition Lab (<http://www.transitionlab.us/>) and inspired by the collaborative principles of the Arco Luna Changemakers Collaborative Network (<http://www.arcoluna.net>). It is dedicated to helping individuals, teams, and organizations achieve impactful and sustainable collaboration, to tackle the most challenging problems with creativity, unity, and purpose. A small grain of sand, contributing to making this world a better place.