



CollaborateUp

Facilitating Collaboration and Multi-Stakeholder Engagement

CollaborateUp is an innovative international consulting firm and SAM and SBA certified 8(a) small business that accelerates cooperation among governments, companies, and nonprofits as they tackle some of our world's toughest challenges. As a **CMMI Level 3 Appraised** consulting & training firm, we've distilled a set of principles, practices, and tools for multi-stakeholder programs that incorporate design thinking, so leaders and co-creators can follow a step-by-step process from design to implementation to evaluation. We've helped organizations in **more than 30 countries** structure outcome-oriented programs that amplify impact and get results faster at lower cost. Our clients have created solutions across a wide range of issues, from workforce development to private sector engagement, from combating fake news to combating wildlife crime.

Our team brings **decades of deep experience** in social behavior change, collective impact, design thinking, and facilitation. Our co-creators have included dozens of corporations (3M, Bayer, IBM, Target), NGOs (Comic Relief USA, PSI, WWF), and U.S. government agencies (USAID, DoD, DoI, IRS, USDA). We support programs from conception and launch through implementation and ongoing management. **Collaborate is in our name: we excel at working with multidisciplinary teams, across multiple cultures, at multiple levels of development.**



Key Service Offerings

Stakeholder Engagement & Strategy Development

We engage stakeholders to co-create programs using our field-tested CollaborateUp Formula and tools to tackle difficult development problems from the bottom-up. Our team includes expert designers and facilitators, employing a human-centered, behavioral science approach to ensure maximum engagement, creating enabling environments that allow for trust

building and collaboration. *Project example:* [The Honey Bee Health Coalition](#).

Lean Start-Up for Collective Impact

We create, scale, and manage collective impact programs with organizations of all sizes to create and sustain 'shared value' - where the strategy and mission of multiple stakeholders intersect in solving tough problems - accelerating time-to-impact. *Project example:* [The ROUTES Partnership](#).

Private Sector Co-Creation: Training Services and Courses

We integrate the principles of collaboration, empathy, and experimentation into our training services to help participants quickly learn, test, and develop concrete skills for tackling challenges that require multi-sector, multi-stakeholder collaboration. *Project example:* [USAID/Professional Development and Training \(PDT\) Co-Creation Training Courses & Advisory Services](#).

Backbone Support

We help partnerships of all sizes close the gap between vision and execution by providing organizational and project management support, helping to hold parties accountable and drive impact and progress in multi-stakeholder initiatives. *Project example:* [USAID/Southern Africa VukaNow Combating Wildlife Crime](#).

Strategic Advisory Services	Curriculum Design, Training, and Evaluation
<ul style="list-style-type: none"> • Design, start, and scale Collective Impact Program • Applied Communications • FAR/AIDAR Compliant Innovation • Leadership Alignment and Engagement • Multimedia and Digital Communication Tools 	<ul style="list-style-type: none"> • Collaboration, Learning, and Adaptation (CLA) • Leading and Teaching Co-Creation Methods • Human Centered Design and Design Thinking • Facilitation and Workshop Development • Partnership Building & Scaling

Multistakeholder Engagement Capabilities

While CollaborateUp has **extensive experience with US government agencies, including the Departments of Defense, Labor, State, Treasury, and USAID, we have also worked directly with civil society organizations and private sector firms**, as well as small- and medium-sized companies, start-ups, and social entrepreneurs. We view every development challenge as a business challenge and vice versa. Our team brings **decades of deep experience in private sector engagement**, navigating **USAID** policies and processes, institutional capacity building and support services, and building collaborative multi stakeholder

partnerships. We support programs from conception and launch through implementation and ongoing management.

Key Capabilities & Past Performance

We have experience in **training and capacity building** through pre-existing curricula and ready-made training that we can rapidly adapt and deploy on various topics including private sector engagement storytelling, co-creation, innovation, and more, all with an eye toward compliance with the **FAR** and **AIDAR**. Our ‘super power’ as a firm consists of delivering innovative **PSE** and **co-creation** in the highly regulated environment in which USAID must operate and we have imbued our training programs with this knowledge and insight. Below are some of our projects relevant to the USAID PSE Policy:

Managing co-creation workshops for localization and inclusion

- **USAID PPL Localization Workshop**

USAID’s Bureau of Policy, Planning, and Learning (PPL), in partnership with the Bureau for Management, hosted a co-creation workshop to engage partners in the development of new strategies and ideas to accelerate USAID’s localization goals. This hybrid event, **Partners in Localization: Designing for Change Co-Creation Workshop**, gathered participants from all over the globe, including local partners, international partners, and USAID Washington and Mission representatives. More than 200 participants joined virtually, and 120 attended in-person at the DC-based venue each day. The two-day co-creation was designed with three different intended outcomes. The first being creating a shared understanding of USAID **localization goals** and **the roles partners can play** in achieving them. The second, the identification of **high priority challenges** which impede localization but offer ample **opportunity for partnership to support solutions**. Then third and finally, a development of **specific actions** that partners might take, in the short, medium and long term, to help USAID continue to accelerate its **progress toward achieving localization goals**.

- **USAID/Indonesia Inclusive Workforce Development**

CollaborateUp worked with USAID/Indonesia to lead a co-creation and co-design process bringing over 100 stakeholders together to develop fundable ideas to improve workforce inclusivity for vulnerable populations and socially-excluded groups. Participating organizations representing civil society, the national and provincial governments, academia, large and small employers, industry associations, and other donors worked through this process to develop concept notes to establish multi-sector approaches and partnerships. This collective action enabled interventions to reflect the diversity of the local context and be tailored accordingly, resulting in multiple awards to local organizations.

- **USAID/HIV Vaccine Innovation, Science, and Technology Acceleration in Africa (HIV-VISTA)**

The client from USAID Global Health Office of HIV/AIDS approached CollaborateUp to design and deliver a Co-Creation process that would encourage four African-based consortia to work together and determine if they wanted to collaborate. In the end, there were two groups that formed as a result. The NOFO stated USAID intends to award up to two awards. The objective of the HIV-VISTA project is to support sub-Saharan African (SSA) scientists, institutions, and innovative systems of collaboration in designing and testing improved HIV vaccine candidates that will advance the field toward the long-term goal of a safe and globally effective HIV vaccine. The Co-Creation workshop created space for collaborators to share their perspectives on gaps in HIV research and inform USAID/OHA on how they would like to work together and receive research support moving forward. The intended outcomes of the Co-Creation were to explore and validate key challenges and problems in HIV vaccine R&D, and then jointly develop promising solutions and/or adapt and expand upon existing approaches. USAID envisioned the initial product of the workshop to be a draft framework from each applicant or group of applicants to address the objectives of the NOFO. On the last day, the participants requested more time to formulate their plans and to set up separate meetings with USAID, which were arranged by CollaborateUp.

Experience in Colombia (and any other relevant experience in other Missions)

- **USAID/Colombia From Fear to Trust Workshop and Local Partners Conference**

CollaborateUp facilitated a co-creation workshop for USAID/Colombia aimed at enabling a series of guided conversations between USAID/Colombia representatives, Fundación Ideas para la Paz (FIP), and two new possible partners (Nacional de Chocolates and Microsoft) to align their vision, purpose and working frameworks to successfully proceed to a new application of an existing GDA. During this activity, CollaborateUp deployed an expert team of native Spanish-speaking facilitators, and helped USAID/Colombia to:

- Provide FIP time to contextualize the learnings of their existing GDA and share their new vision.
- Encourage networking and explore collaborative relationships between organizations.
- Aim to have verbal institutional commitments to formalize a partnership.
- Identify a shared vision, theory of change and results framework.
- Clarify the purpose, roles and responsibilities of the partners, as well as next steps.

Given the complexity of the project, USAID asked the CollaborateUp to support them in convening the existing partners and new potential partners. There were many uncertain variables, yet CollaborateUp was able to create an adaptive design to support the greater goals of the project and the emergent needs of the group. Our team facilitated critical conversations among original partners and new operating partners. The team spent significant time building relationships between the organizations to generate trust and find real understanding between partners.

- **Combating Wildlife Crime in Southern Africa (VukaNow)**

CollaborateUp provides backbone support to 5 separate multi-sector projects working across 7 Southern African countries to combat wildlife crime. We helped develop the overall collective impact strategy and lead collaboration, learning, and adaptation (CLA) approaches and knowledge management tools to support VukaNow in tackling a lack of coordination and trust within and across national boundaries and among a multitude of stakeholders from national governments, to law enforcement, the judiciary, donors, the private sector, and communities. CollaborateUp also designs and facilitates a workshop series called Special Platforms for Action, Reflection, and Collaboration in CWC (SPARCCs), including several on community-level social and behavior change (SBC) and corruption.

- **USAID/PSE Private Sector Engagement Storytelling Activity**

To help USAID's Private Sector Engagement (PSE) Team to accelerate, magnify, and institutionalize PSE at USAID, CollaborateUp developed and piloted a training to strengthen the capacity of Agency communicators and technical staff in understanding the PSE Policy ("Policy") and frame the stories of specific PSE programs within the context of the Policy and the Agency's new collaborative approach to PSE. CollaborateUp developed the training to include direct instruction on the tenets and principles of the PSE policy, the differences between the new PSE approach and former private sector partnership approaches and the differences in language between development communications and private sector communications.

Managing finance-related stakeholder engagements and roundtables

- **CATALYZE Innovative Blended Finance: Market Assessment of the Non-State Education Sector in Latin America and the Caribbean Region**

CollaborateUp developed a regional market assessment of the non-state education sector with a particular focus on six Latin American countries from previous country-level market assessments which included the Dominican Republic, Ecuador, El Salvador, Guatemala, Haiti, and Paraguay. This assessment helped to inform investors and development partners including USAID of how they might be able to respond to the funding gap through the use of blended finance mechanisms. Through our analysis of existing market assessment reports and additional desk research, we identified the key features of the non-state education sector in Latin America. From this analysis, we

determined which of the six countries and others in the broader region illustrated strong potential for implementing private sector-led education finance activities relevant to USAID's CATALYZE EduFinance program. The report helped form one of the building blocks to 1) increase access of non-state schools and other education enterprises to private capital and 2) incentivize expanded access and improved quality, which would result in greater, more equitable access to education opportunities and improved learning outcomes.

- **USAID/BHA Caribbean: Blended Finance De-Risking**

We currently work with USAID/BHA to support the development and establishment of a Caribbean Corporate Investment Resilience (CCIR) Program. The aim of this work is to identify and use market-based blended finance mechanisms to invest in companies that address vulnerabilities in the supply and value chains ultimately to increase resilience and support disaster risk reduction and response readiness. We also provide oversight and management of two subcontractors and their teams and manage the investment fund pipeline and distribution of funds to investees. Throughout this pilot project, we are documenting best practices and lessons learned in a learning agenda to share knowledge that can be used in future related projects in other regions and contexts.

Advisory Services, Guidance, and Tools (ASGT)

- **USAID Professional Development and Training (PDT) Co-Creation Training and Advisory Services**

We currently serve as the prime contractor on a multi-million dollar award which provides specialized training and technical consulting services to USAID Washington and Mission staff to help modernize USAID's future business practices, including those related to PSE and co-creation. To expand beyond the standard core training, USAID M/OAA/PDT relies on us to regularly update and incorporate new and innovative topics in the Acquisitions and Assistance process. Each course/workshop helps Missions and Operating Units contribute to USAID's mission and execute on USAID's private sector engagement policy. We have sourced experts and facilitators for co-creation courses and workshops for missions around the world. Many of our co-creation training and facilitation projects focus on private sector engagement including buy-ins such as USAID/Colombia where we led private sector outreach as part of a Global Development Alliance outreach strategy to address post-COVID-19 economic response and recovery.

- **USAID Acquisition & Assistance Strategy Stocktaking Review and Refresh**

In January 2021, USAID's Office of Acquisition and Assistance (M/OAA) launched a comprehensive stocktaking process to review the implementation of its A&A Strategy and inform a refresh that would reflect current context, support the Agency's emerging priorities, and incorporate feedback from the A&A workforce. They envisioned a process that would entail learning how Agency staff understood and applied the 2018 Strategy, including key enablers and constraints to its implementation, identify ways to integrate new Agency priorities in the revision process, garner wide support from OAA and Agency staff in operationalizing the refreshed Strategy, and position the revised Strategy as an overarching roadmap to bring A&A staff closer to the Agency's program cycle. USAID aimed to produce a co-designed 2022 A&A Strategy that would continue to guide improvements and innovations in USAID procurement and partnering. USAID contracted CollaborateUp to support the Strategy review and refresh process through feedback sessions, case study analyses, and leadership and subject matter expert consultations. CollaborateUp joined USAID's effort during Phase 2 of the 4-Phase process (focused on review, consultations, and analysis), following an initial planning and pre-positioning period (Phase 1). CollaborateUp carried out the following tasks to support the M/OAA Strategy Team's stocktaking efforts and gather information for a more current and improved 2022 Strategy.