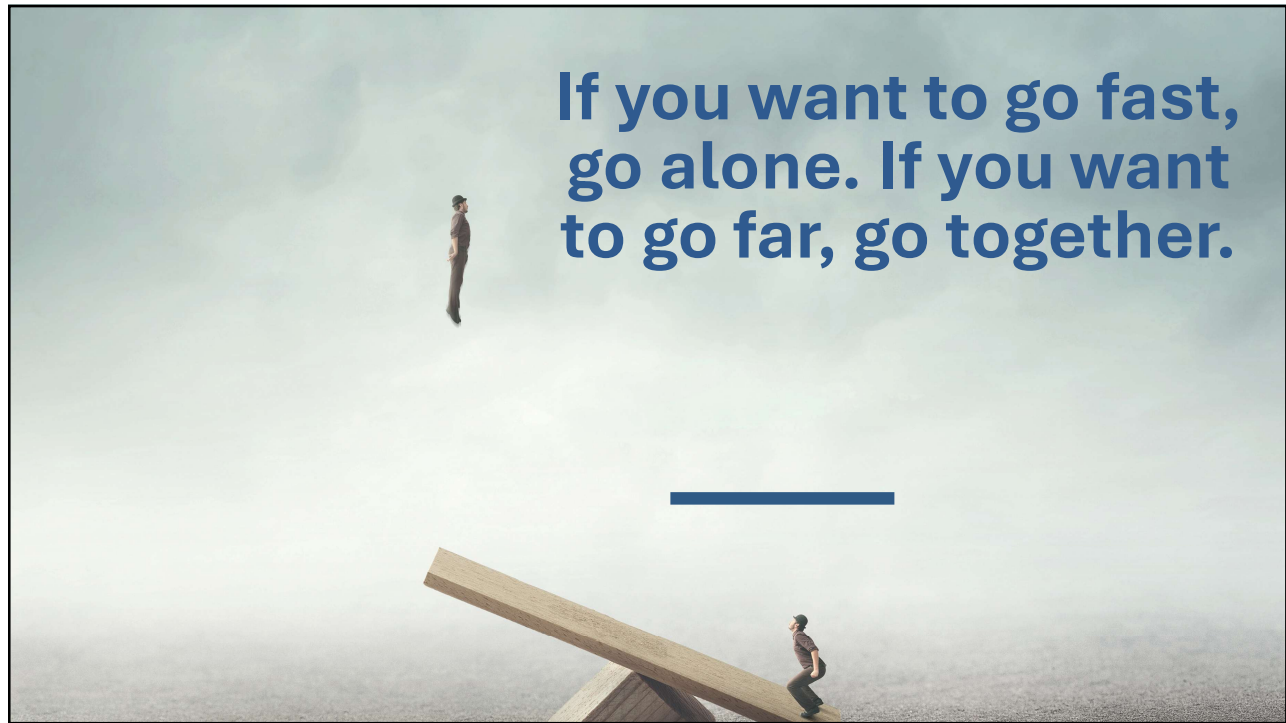
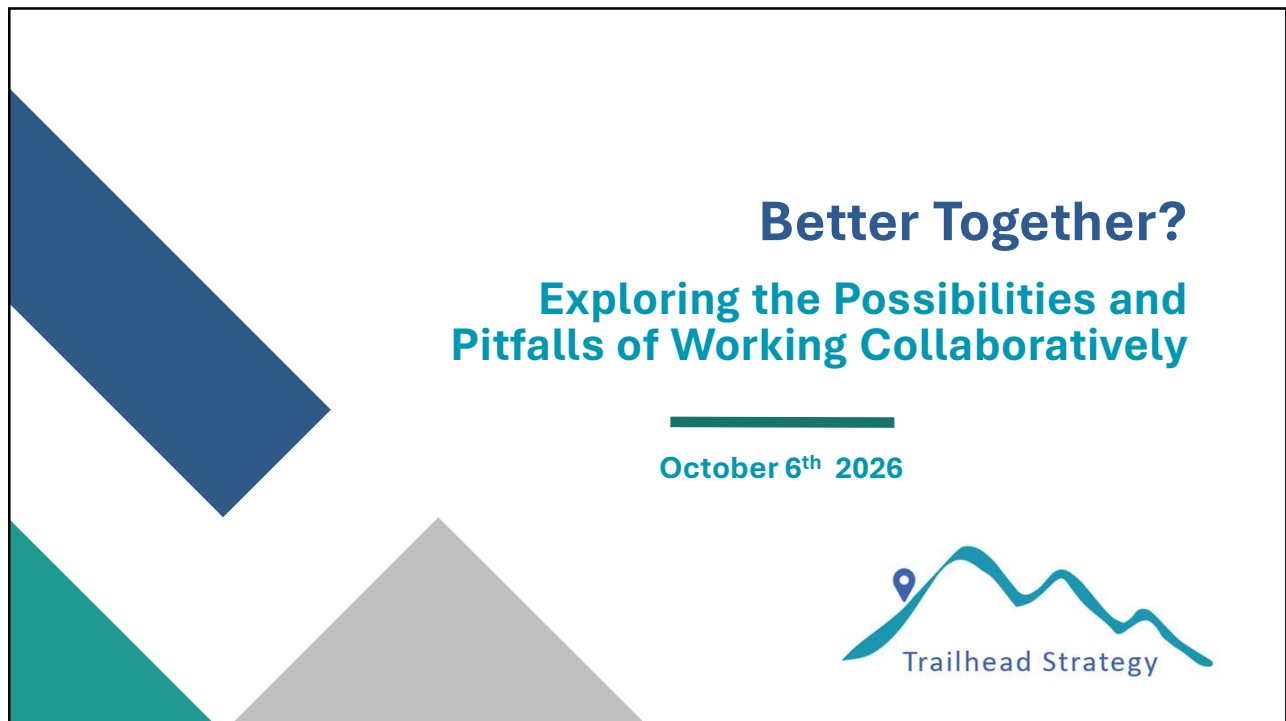




1



2

Great Teams

What is the most effective team you have ever been a part of? What made it so?

What is the least effective team you have been a part of?

3

Agenda

- Collective & individual impact
- Strategic Alliances Continuum
- Partnership examples and case studies
- Some thoughts on developing partnerships
- Assess readiness & pitfalls



4

Our Framing Question

*“In the work we’re trying to advance,
what happens when we act alone and
what becomes possible when we act
together?”*

5

Advantages & Challenges

Around your table....

What are some of the **advantages** that come with working in collaboration with other organizations

What are some of the **challenges** that come with working in collaborations with other organizations

6

Partnership & Collaboration Bingo



7

Circulate around the room and find peers who have done any of the following. When you find someone, ask them briefly about the example and write their name in the square.

You can only use each person once.

Partnership and Collaboration Bingo

Circulate around the room and find peers who have done any of the following. When you find someone, ask them briefly about the example and write their name in the square. You can only use each person once.

Co-hosted a program	Delivered a joint workshop or training	Shared curriculum or program materials	Referred clients through a referral pathway	Coordinated service delivery with another agency
Shared staff or space	Shared administrative systems (e.g., case management software)	Partnered on a grant	Co-applied for government funding	Participated in a joint fundraising campaign
Explored a joint earned-income venture	Participated in a coalition	FREE	Worked together on a policy issue	Joined in a regional/provincial network
Considered a merger	Discussed joint programming with another agency	Co-designed a pilot project	Participated in a learning community of practice	Collaborated on a community needs assessment
Shared volunteer pools	Shared data or evaluation tools	Co-authored an advocacy paper	Joined a collective impact	

8



9

Collective Impact

Collective Impact is a structured approach to solving complex community challenges. Instead of isolated programs working in parallel, it brings organizations together around a shared agenda, coordinated action, and continuous learning. It's most useful when no single organization can move the needle alone.

Kania & Kramer, 2011

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The 5 Conditions of Collective Impact

The model is built around five core conditions:

- **Common Agenda.** Agreement on the problem and desired change
- **Shared Measurement.** Tracking progress with common indicators
- **Mutually Reinforcing Activities.** Each partner contributes in ways that fit their strengths
- **Continuous Communication.** Trust-building and alignment over time
- **Backbone Support.** A coordinating function that keeps the work moving

Kania & Kramer, 2011

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The 5 Conditions of Collective Impact

Collective Impact gives us a lens for thinking about partnerships as it helps us ask:

- When does working alone limit our impact?
- When does working together unlock something bigger?
- What structures or agreements make collaboration easier and more effective?

Kania & Kramer, 2011

12

Shared Leadership

Shared leadership is the intentional distribution of influence and decision-making across organizations so that partners guide the work together rather than operating in parallel or in silos.

It emphasizes shared responsibility for outcomes, coordinated authority, and transparent decision pathways.

It is the practice of combining each organization's strategic perspective, and expertise to steward the joint initiative as partners, aligning decisions, resources, and leadership across the collaborating entities.

Source: CRA, 2023

13

The XY Exercise



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The XY Exercise

- The game is played in 10 rounds.
- In each round, every player privately chooses X or Y.
- After all choices are submitted, scores are calculated based on individual decisions.
- Some rounds have higher point values.
- Opportunities for discussion will occur at set intervals.
- What you say and what you choose do not have to be the same.

15

The XY Exercise

WIN AS MUCH AS YOU CAN!

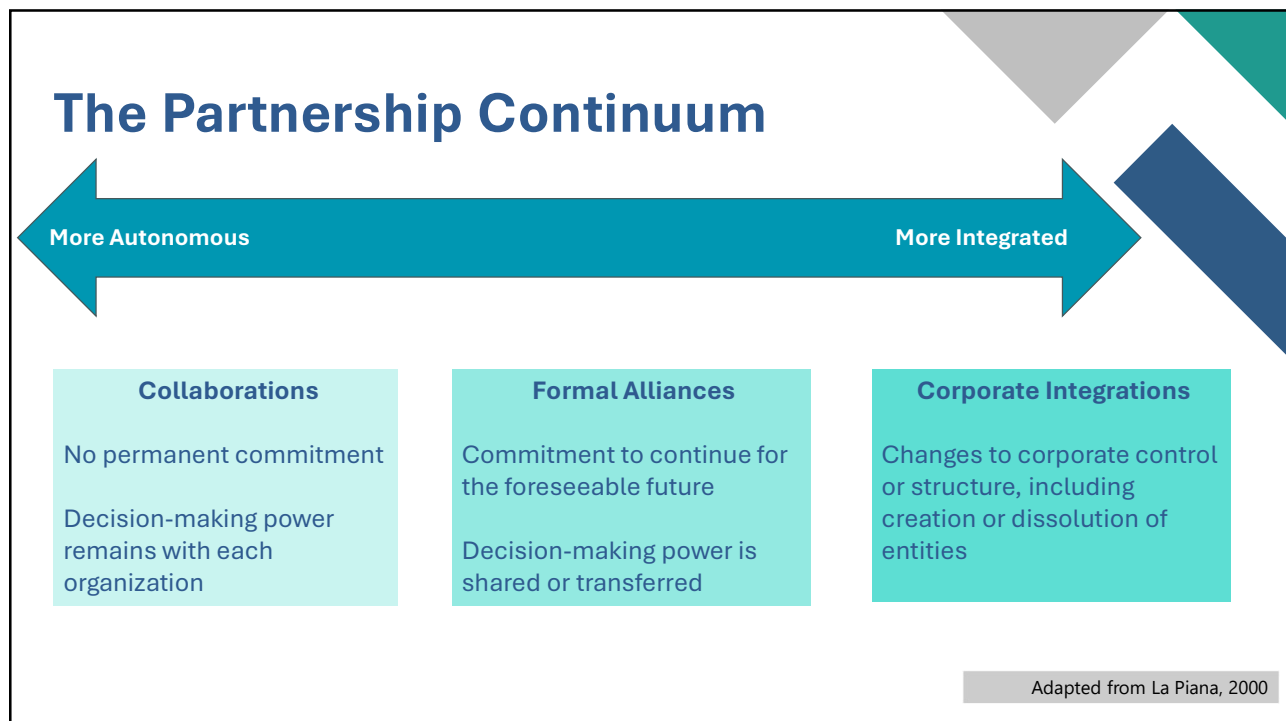
Scoring Key for Groups of 4

- If ALL players selected X \$100 to each player
- If ONE player selects Y and all other players select X \$300 to that player; \$100 deducted from the others.
- If TWO players select Y and all others select X \$200 to those players; \$200 deducted from the others.
- If THREE players select Y \$100 to those players; \$300 deducted from the others.
- If ALL players select Y \$500 deducted from each player.

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18

Collaborations

More Autonomous

More Structured

Collaborations offer flexibility in pursuing goals without requiring any change in how partner organizations are structured or managed and need last only so long as it takes for goals to be reached.

If you want to...

- Pool expertise or resources
- Amplify a policy message
- Create and share collective wisdom
- Tackle social issues requiring sustained, coordinated action

Adapted from La Piana, 2000

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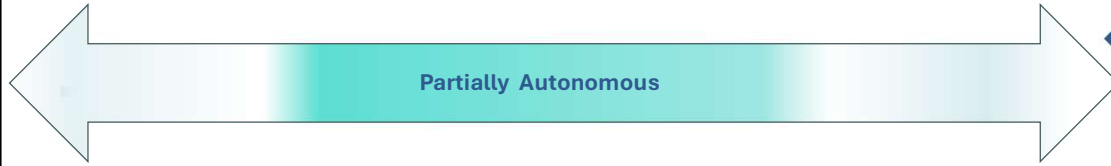
Chilcotin Community Cooperative

Collaboration Example



20

Strategic Alliances



Strategic alliances can be highly effective, offering more formal and longer-term partnership structures than basic collaboration while still allowing each organization to maintain a significant degree of autonomy.

If you want to...

- Improve administrative or program efficiency
- Provide more diverse / impactful services or programs
- Share the benefits (and risks) of a revenue-generating social venture
- Leverage advocacy, purchasing power, standards setting and enforcement, or other activities

Adapted from La Piana, 2000

21

connectFASD

Strategic Alliance
Programming

Image Source: <https://www.facebook.com/CalgaryFASD>



22

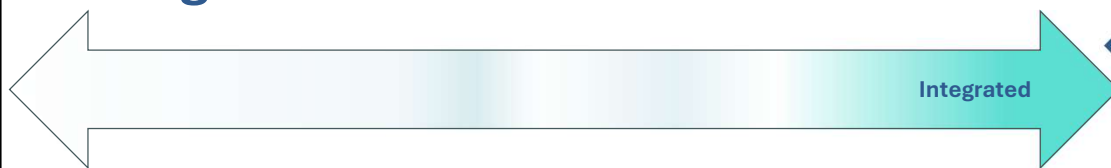


Strategic Alliance Fundraising

Image Source: <https://www.facebook.com/RESOLVEyyc>

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Mergers, Consolidations, Amalgamations



Corporate integrations represent a more complex and permanent form of partnership. It can create significant upside, but it also requires navigating meaningful structural, cultural, and operational challenges.

If you want to...

- Combine specialized skills and expertise to strengthen overall capacity
- Enhance service offerings, expand reach, or reduce duplication across programs or back-office operations
- Increase financial security and resilience through shared resources, diversified revenue, or stabilized cost structures

Adapted from La Piana, 2000

24

CRA Guidance

Two or more registered charities can join together as one body in response to changing circumstances or changed objectives. They can join through an amalgamation, merger, or consolidation. **Although these terms are sometimes used interchangeably, there are important distinctions between them for charities.**

We recognize that the Charities Directorate's use of these terms may differ from their meaning in other situations. For example, some provincial legislation may use the word "amalgamation" when referring to a situation that the Charities Directorate considers to be a merger or a consolidation.

Source: CRA, 2023

25

CRA Definitions

Amalgamation

- Two or more organizations join together by bringing their assets, liabilities, and members into the new organization that they become. **The original organizations do not cease** to exist or dissolve, they simply flow into and continue to exist within the new amalgamated organization.

Merger

- One organization winds up its affairs and transfers its assets to another already existing organization. **No new entity needs to be created, but the old one is dissolved.**

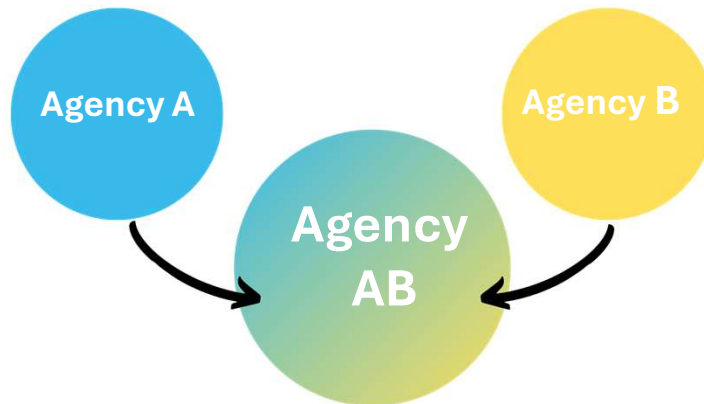
Consolidation

- **All organizations involved transfer assets to a newly created entity.** This new forward-looking entity can be whatever the founding organizations agree it should be. The old organizations may dissolve or carry on some other way.

Source: CRA, 2023

26

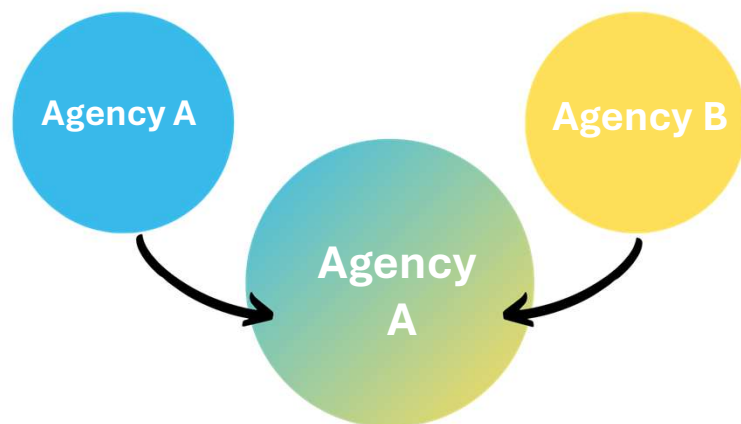
Amalgamation



Source: CRA, 2023

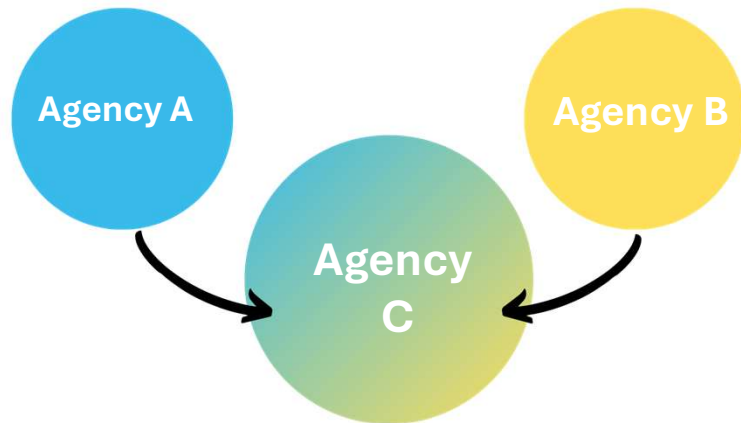
27

Merger



28

Consolidation



Source: CRA, 2023

29

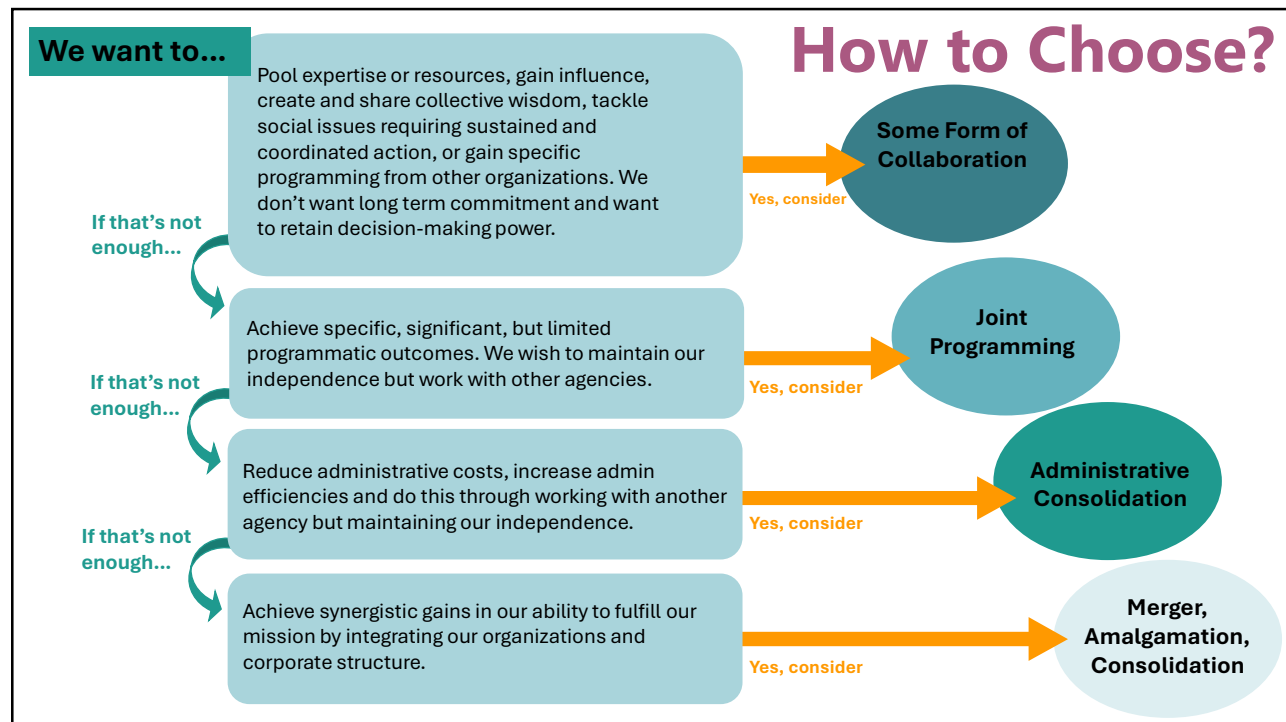
Merger Example

NATIONAL
access
ARTS
CENTRE

Image Source:
<https://www.facebook.com/photo.php?fbid=599482405553179&set=pb.100064742734392.-2207520000.&type=3>



30



31

Do We Merge, Consolidate or Amalgamate?

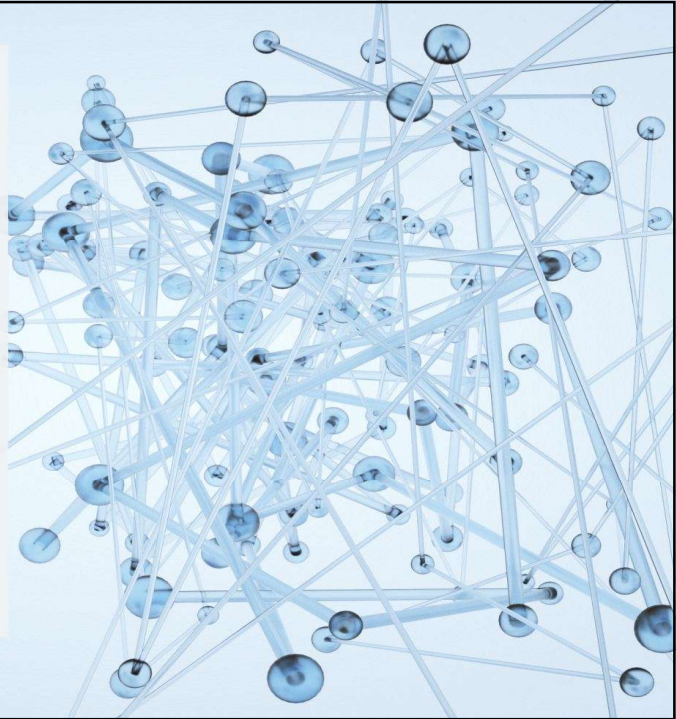
Factors to Consider	True	False
The agencies need a high level of integration in order to achieve their desired outcomes, e.g., enhanced programming, cross-discipline services, broader range of people served, enhanced sustainability, reduced duplication.	Merger or consolidation	Dissolution, amalgamation or none
One of the agencies has significant debt or liabilities		
One of the agencies has a funding source that is unique and is not transferable to the new entity	Merger as surviving agency or amalgamation	All options open
Board will not approve merger or dissolution		
Agency is a member organization and members won't approve merger/dissolution	Amalgamation or consolidation or none	All options open
Both agencies have equal capacity		
One of the agencies has significantly more assets	Merger as surviving agency or dissolution of other agency	All options open
One agency is better positioned to be the surviving agency		
Both agencies are charities	All options open	Makes some options more complicated
One agency has significant brand recognition		
	Merger as surviving agency or	

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Two of the best things that any participant at any level can bring to the process of merging or creating an alliance is a **high tolerance for ambiguity** and a **sense of humor** – and the sense of humor is optional.

The process is intrinsically confusing and often misleading, and its **complex, nonlinear nature** makes it hard for anyone to grasp it all.

Thomas McLaughlin, *Nonprofit Mergers and Alliances*, 1998



33

Working with Strategic Alliance Concepts



34

- Discuss which Strategic Alliance options might be appropriate to explore from informal collaboration to formal alliances to full corporate integration.
- Consider the pros and cons of each potential alliance pathway, including operational, cultural, financial, and governance implications relevant to your scenario.
- Select the alliance option your group believes best fits the needs of the agencies.
- Highlight the key strengths that make your chosen alliance path promising for the organizations, and identify the potential challenges or risks
- Report back to the larger group

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Scenario 1

- 1 large agency, 1 small agency
- The **small agency** provides a unique service, working with individuals with addictions. They receive some funding from Alberta Health Services but most of their funding comes from private donors.
- The **large agency** provides a broad range of mental health services. Their demand for services is shifting towards an increasing need for addiction services. The large agency is primarily funded by the government.
- Both agencies are stable both financially and in their leadership.

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Scenario 2

- 2 medium sized agencies
- Agency A has had turnover in leadership multiple times over the years and is struggling financially due to some mismanagement. The Board is primarily made up of the original founders of the agency.
- Agency B has had stable leadership and finances for years and has strong financial practices in place. They provide different services than Agency A but the two agencies share many of their clients, with these individuals accessing services from both agencies. Agency B's strategic plan has identified growth as a desired outcome.

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Scenario 3

- 1 small agency, 1 medium agency
- The small agency has highly valued niche programming but only a few paid staff. They have not been able to expand their services or presence in the sector due to a lack of infrastructure and administrative systems.
- The medium agency has solid program offerings and excellent administrative systems and processes. Due to their efficiencies, they have identified excess capacity in their administrative services.

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What Makes Collaborations Fail



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Lack of Strategic Clarity

- Partners lack a shared definition of the problem, which leads to divergent priorities and inconsistent approaches to the work.
- Expectations of success don't align, creating tension around outcomes, timelines, and what each organization believes the collaboration should achieve.
- Collaboration is driven by funding pressure instead of mission fit, resulting in partnerships that dissolve once the external incentive disappears.

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Cultural Misalignment

- Different communication styles lead to misunderstandings, uneven information flow, and frustration about how decisions or updates are shared.
- Varying tolerance for risk or ambiguity creates tension when one partner is comfortable experimenting or moving ahead without full clarity while the other prefers caution and predictability.
- Mismatched values around client service or community engagement make it difficult to align on priorities and approaches look like in collaborative work.

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Resource & Capacity Gaps

- No dedicated staff to coordinate the partnership means collaboration work is fragmented, inconsistent, or deprioritized.
- Collaboration becomes “extra work” layered onto already full workloads, reducing attention, follow-through, and momentum.
- Partners underestimate the time and effort required, leading to unrealistic expectations and uneven contributions.
- Burnout and fatigue emerge when capacity is stretched too thin, causing partners to disengage or withdraw from the collaboration.

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Unclear Roles & Responsibilities

- Assumptions about who is handling key tasks lead to missed work and frustration when responsibilities aren't explicitly assigned.
- No clarity on leadership or decision ownership creates confusion about who is accountable for moving pieces forward.
- Overlapping responsibilities cause tension, duplication, and second-guessing when partners unintentionally step on each other's work.

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Power Imbalances & Insufficient Trust

- Uneven decision-making authority creates frustration when one partner drives choices or sets direction.
- Perceived tokenism or unequal influence leaves smaller organizations feeling sidelined or undervalued in the collaboration.
- Concerns about transparency and data sharing erode trust, especially when information flows unevenly between partners.
- Fear of losing visibility or control limits openness and weakens collaborative commitment.

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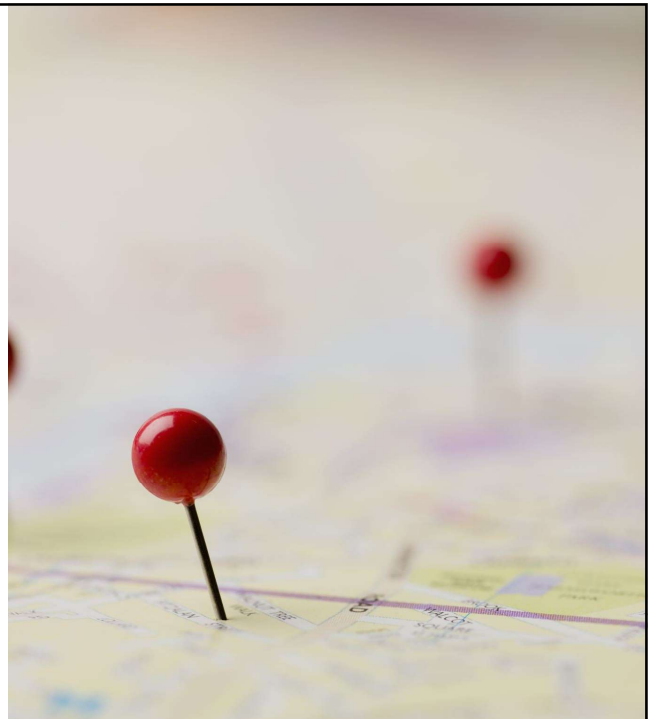
Planning Alliances



45

Planning your future is
always better than having
the future overtake you

Muttart Foundation / Miller Thompson, 2020



46

Getting Started

- **Why consider a strategic relationship?** Clarify the core problem or opportunity driving the conversation.
- **What do you hope to accomplish?** Identify the outcomes or improvements you want from working together.
- **Are you ready?** Assess internal stability, governance alignment, and available capacity.
- **How do you find and approach a partner?** Identify aligned organizations and plan a respectful, exploratory outreach.

La Piana, 2000

47

Anticipating Issues and Barriers

- **Staff and Volunteer impacts.** Uncertainty about roles, workload changes, or cultural fit
- **Program Alignment.** Differences in service models or anticipated shifts in clientele and demand
- **Financial and Funding risks.** Concerns about stability, donor reactions, or uneven financial positions
- **Identity and Reputation.** Fear of losing community support, organizational autonomy, or long-standing brand identity
- **Risk awareness and Mitigation.** Identifying operational, legal, and strategic risks early and developing mitigation plans to reduce uncertainty and support decision-making.

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Due Diligence

The essence of the due diligence process is an effort to make everyone on the negotiations committee, and by extension everyone on each board, as aware as a prudent board member can be of any liabilities the other party may bring to the merger.

49

Due Diligence

- | | |
|--|--|
| <ul style="list-style-type: none"> • Values and Culture • Legal and Regulatory • Governance • Finances • Fundraising • Organizational Design • Marketing and Communications | <ul style="list-style-type: none"> • Leadership • Human Resources • Programs and Service • Brand • Space • Operational Systems |
|--|--|

50

Phase 1: Commitment/Assessment

Project Management/Facilitation
 Create Task Force
 Legal Consult
 Identifying Desired Outcomes
 Mission, Vision and Culture Alignment
 Create MOU

Conduct Due Diligence
 Learn from Others
 Develop Evaluation Framework
 Create Communication Messages
 Recommendation(s) related to
 continuing to Phase 2 Planning

Decision Point

51

Phase 2: Commitment/Assessment

- In-depth planning to develop the future model.
- Creating the “How” – how it will occur e.g., how will funds move between agencies, what financial system will be used, how will staff positions be impacted, what will the organization chart look like, etc.
- Includes development of a more formal communication plan both internally and externally
- Formal approval required (by Society typically) at end to continue.

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Phase 3: Integration/Implementation

- Aligning workflows, systems, policies, and staffing structures.
- Merging service models, consolidating back-office functions, unifying financial systems, and managing continuity for clients and funders.
- Transferring assets, dissolving entities, securing CRA approvals, and meeting funder requirements.
- Supporting staff and volunteers through transition and shaping a shared organizational identity.
- Maintaining trust with clients, donors, partners, and the community.
- Using feedback and checkpoints to refine the integration as complexities emerge.

53

Resources

- Jane Arsenault, *Forging Nonprofit Alliances: A Comprehensive Guide to Enhancing Your Mission Through Joint Ventures & Partnerships, Management Service Organizations, Parent Corporations, and Mergers*, 1998.
- Thomas A. McLaughlin, *Nonprofit Mergers and Alliances*, 1998.
- David La Piana and Robert Harrington, *The Nonprofit Mergers Workbook Part I: The Leader's Guide to Considering, Negotiating, and Executing a Merger*, 2000

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One Next Move

“What is one concrete action you can take in the next 30 days that strengthens your organization’s ability to collaborate well, either by clarifying something internally or by reaching out externally?”

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Thank you

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