UNDERSTANDING THE OPTIONS:

Collaboration Models for B.C. Immigrant Serving Agencies

AN AMSSA GUIDE

Affiliation of Multicultural Societies
& Service Agencies of BC

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UNDERSTANDING THE OPTIONS: Collaboration Models for B.C. Immigrant Serving Agencies

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I look forward to a discussion of collaboration options and future directions with AMSSA - IICC members.

Respectfully,

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TABLE OF CONTENTS

INTRODUCTION

In 2002/03, AMSSA completed the *Sectoral Development Project* for member agencies of the Immigrant Integration Coordinating Committee (IICC) to assist them with the transition to an open tender model for governmental contracting of immigrant settlement services in BC. At the conclusion of this project, IICC member agency representatives were asked to indicate what additional supports AMSSA could provide to further assist with this transition. In response, IICC Member Agencies requested that AMSSA seek the capacity to:

a) carry out a review and analysis of collaborative service delivery models for the provision of immigrant settlement services, and;
b) engage Geographic Information Services (GIS) to map immigrant populations and existing settlement services for the BC Lower Mainland.

The following is a review of collaborative service delivery models that addresses four objectives:

- To enhance the current body of knowledge regarding collaboration as a strategy for adapting to change, specifically from the perspective of immigrant settlement agencies.
- To conduct a targeted review of current and past collaborative initiatives of immigrant settlement agencies in BC and other provinces, and other social serving sectors in BC.
- To provide an assessment of each model's strengths and weaknesses as they apply to the BC immigrant settlement sector.
- To provide practical information for IICC member agencies, non-IICC settlement agencies in BC and other provinces, and selected other BC social serving agencies, that will inform their planning process and increase their capacity to respond to the open tendering process in an effective and efficient manner.

HOW TO USE THIS GUIDE

The guide begins with a brief summary of research in the area of collaboration: main reasons to collaborate, obstacles and keys to success common across all models, plus several helpful hints. This is followed by a summary of collaboration issues that specifically relate to the immigrant settlement sector.

The main section of the guide has been laid-out in a user-friendly manner beginning with "The Collaboration Continuum". This diagram presents a quick visual overview of the range of collaboration models possible. For each model, a detailed overview is presented that includes an analysis of model governance, relative advantages and disadvantages, potential benefits (note the use of the term "potential"), possible challenges and pitfalls, risks and liability, areas of possible cost-savings, time to implement, cost of implementation, organizational autonomy, specific tips, and additional sources of information. Each model is also accompanied by two case studies taken from the settlement sector whenever possible. These case studies provide a unique insight into the "real-world" application of the model giving IICC managers the opportunity to learn from the experience of other settlement organizations. Almost all of the case studies share one thing in common which is they tell the story of community organizations who have chosen to face the current challenges of government cutbacks, regionalization, and contract restructuring in a coordinated and cooperative manner.

The intent of this guide is not to duplicate the excellent general resources on collaboration and partnerships available such as *The Partnership Toolkit* (see "Alliances/Consortiums"). Rather, it is meant to provide detailed information for IICC member agencies to assess the different models as they apply to their particular agency structure, environment, community, and service needs. This will facilitate agency managers and board members to make informed decisions regarding if and how to enter into inter-agency collaboration in service delivery. The guide is also meant to provide more detailed information on innovative models of collaboration beyond simple referrals and information sharing, which already occurs widely across the sector.

The reader should note that the field of collaboration uses many labels for similar concepts. Within this guide, the terms "collaboration" and "partnerships" are used interchangeably.

REASONS TO COLLABORATE

Despite the significant commitment of human and sometimes financial resources required for collaboration, there are many compelling reasons for organizations to increase their scope of collaborative activities. These include:

- increased financial and organizational stability
- improved service delivery
- reduced duplication of services
- innovative solutions to fill existing gaps and meet increasing demands
- one-stop shopping for clients
- more holistic service delivery through integrated community approaches
- increased ability to respond and act on a larger scale
- potential cost and time-savings through shared administration and program delivery
- greater accountability of limited resources
- enhanced resource development capacity
- new ideas and energy
- funders favour collaborative proposals
- decreased competition
- increased information sharing
- access to a larger knowledge and skill base
- better connections and networks
- greater visibility and credibility in the community
- more influence speaking as a united voice
- reduced isolation for smaller organizations
- access to a greater number of resources among organizations

KEYS TO SUCCESS

There are numerous examples of successful partnerships among community organizations. These partnerships are characterized by:

- high levels of communication, trust, and commitment among partners
- strong leadership
- strong managerial will and staff support
- similar organizational mandates
- comparable organization sizes
- stable organizations
- a small number of partners
- equitable commitment of resources from partners
- a history of working relationships among partners

POTENTIAL OBSTACLES

Collaboration does have its challenges and it pays for organizations to be aware of them. Some of the more common obstacles experienced are:

- increased (and usually unfunded) demands on executive directors' time
- confusion around vision or goals
- lack of clear roles for partners
- loss of direction or focus
- clash of different organizational cultures
- resource inequities among member organizations
- lack or change of leadership
- unequal involvement of partners
- erratic attendance at meetings
- failure of planned projects
- negative publicity
- partner burn-out
- too much bureaucracy
- turf battles
- diversion of too many resources from regular programming
- losing touch with the community
- inadequate or loss of funding
- concerns over risk and liability
- rushing the process
- lack of funding for partnership development

HELPFUL HINTS FOR STARTING OUT

Keep the following tips in mind to help your collaboration get off the ground and running smoothly:

- Define a clear vision and stay focused on it
- Establish common understandings and ground rules
- Develop clear roles for members and leaders
- Establish a formal decision-making process and mechanism for resolving disputes before they arise (and they will!)
- Be open and use mutual-disclosure to build trust
- Deal with difficult issues head-on
- Focus on long term outcomes versus short term rescue plans
- Keep staff informed of the process throughout
- Involve those stakeholders who will be affected by the process
- Strive for "win-win" scenarios
- Test out the alliance early with small, simple projects that build trust, commitment, and credibility with stakeholders
- Divide up tasks based on who has most expertise in an area
- Keep good documentation of the process
- Involve a neutral third party for negotiations when appropriate
- Spend time getting to know others
- Choose your partners proactively, forced partnerships are rarely successful
- Develop goals and objectives with timelines
- Be persistent and patient
- Take the time to do it well
- Celebrate small successes!

COLLABORATION IN THE SETTLEMENT SECTOR

While researching the area of collaboration and partnerships from the perspective of immigrant and settlement agencies, several common themes emerged:

- AMSSA - IICC members are involved in a wide variety of collaborations, primarily of a joint program nature.

- Collaboration by immigrant-serving agencies with diverse community partners is an effective tool for educating mainstream organizations about the needs of immigrants and refugees and for promoting the development and delivery of more culturally competent social services.

- Conversely, the above can also be a challenge for immigrant-serving agencies who may feel they have to continually struggle to bring mainstream partners up-to-speed on pertinent immigrant and refugee issues.

- More immigrant and settlement agencies are being asked to partner these days with mainstream agencies who are trying to ensure their services are culturally competent. However, this can develop into a relationship where the benefit is not mutual. For example, immigrant-serving agencies have been asked to partner with mainstream agencies seeking accreditation in order to satisfy requirements that they are culturally diverse and accessible. In some instances, this relationship does not always bring the same degree of value to the immigrant-serving agency.

- Collaboration and the development of partnerships is not an activity that is usually funded. Most managers of immigrant-serving agencies, and particularly those from small, volunteer-based organizations, end up doing it off the corner of their desk. These extra demands are compounded by the fact that many staff at immigrant-serving agencies are already overworked and underpaid compared to their colleagues at more mainstream organizations. The qualifications of settlement workers are also not often recognized, which can impact their ability to work effectively with other mainstream organizations who do have professional credibility (McLellan, 2000).

THE COLLABORATION CONTINUUM

→ increasing integration, decreasing autonomy

	Joint Programs	Online Collaboration	Coalition	Cooperative	Alliance/ Consortium	Co-location	Merger
Model Overview:	• pg. 14	• pg. 18	• pg. 22	• pg. 26	• pg. 30	• pg. 35	• pg. 42
Case Studies:	• Building Bridges • Legal Advocacy Program	• www.settlement.org	• Working Group on Poverty • Immigration Sector Council of Calgary	• Islands Community Services Co-op • Kootenay Boundary Regional Resources Co-op	• South Fraser Community Service Alliance • NEVCO	• Pacific Immigrant Resources Society • Pacific AIDS Resource Centre	• Manitoba Interfaith Immigration Council • Boys and Girls Club of Delta

JOINT PROGRAMS

DESCRIPTION

The joint management and delivery of programs and services that further the mission of participating organizations.

GOVERNANCE

- co-managed via steering committee with representation from all partners
- one agency usually chooses to be responsible for administering grants, hiring and supervision of employees, communication with funders, and other administration (also known as a lead agency or fiscal sponsor)

ADVANTAGES

- simplest form of collaboration
- reduced workload for non-lead agencies
- allows new partners to collaborate on a small scale and build trust
- diversifies project funding which increases sustainability

DISADVANTAGES

- increased responsibility and workload as lead agency
- lead agency can end up subsidizing certain aspects of program, e.g. project development, administration, staffing
- increased dependence on partners to carry through on their commitments
- loss of direct control over expenditures of resources

POTENTIAL BENEFITS

- opportunities for enhanced service delivery, continuum of services, reduced duplication
- access to new or expanded client groups, facilities, expertise, and other resources
- opens up opportunities for larger collaboration
- decreased competition for funding

POSSIBLE CHALLENGES AND PITFALLS

- unequal commitment from partners
- concern that larger partners will 'take over"
- individual staff may present obstacles despite an organization's overall commitment to partnering
- changes in staff can damage or enhance the partnership
- relationship can be affected by changes in leadership
- lead agency must provide oversight from a distance to ensure contractual obligations are met
- coordination of information and maintaining consistency of on-site procedures among different locations
- supervision of off-site staff
- project staff may have more than one supervisor
- maintaining a connection and agency identity with off-site staff
- disruption if one partner leaves
- clash of organizational cultures
- lack of funding for development and management of the partnership

JOINT PROGRAMS (cont'd)

RISK/LIABILITY

- risk by association as the agencies' reputations become more closely linked
- lead agency is ultimately accountable for administration of any shared grants and final reporting, responsible for proper oversight and support of joint projects
- the organization with the strongest internal controls and willingness should act as the lead agency
- fiscal sponsorship agreement is a legally enforceable agreement
- since the law considers the project and the sponsor to be one legal entity, each can be held responsible for the actions of the other
- ensure each partner has both directors' and operators' and sufficient third party liability insurance
- prepare a partnership agreement or memorandum of understanding detailing roles and responsibilities and have it reviewed by an accountant and/or lawyer
- include clauses regarding decision-making, conflict resolution, and termination of the relationship

AREAS OF POTENTIAL COST SAVINGS

- non-lead agencies can save on administration and staffing
- shared project promotion

TIME TO IMPLEMENT

- usually characterized by a short start-up period, depending on the scope of project and availability of funding

COST OF IMPLEMENTATION

- depends on size and scope of project

ORGANIZATIONAL AUTONOMY

- high

TIPS

- find partners first and develop the project together to increase ownership and viability
- choose partners you know you can work with
- focus on common values, vision, and outcomes
- troubleshoot potential problems ahead of time and build these into the partnership agreement

CASE STUDIES

- Building Blocks (non-lead agency)
- Legal Advocacy Program (lead agency)

ADDITIONAL RESOURCES

- Colvin, G. L. *Fiscal Sponsorship: 6 Ways To Do It Right.* San Francisco, CA: Study Centre Press.
- Edie, J. A. (1989). *Use of Fiscal Agents: A Trap for the Unwary.* Washington, DC: Council of Foundations.
- http://www.genie.org/ (FAQ sheet on fiscal sponsorship)

JOINT PROGRAM CASE STUDY
Building Blocks

Building Blocks is an early intervention program for young mothers at risk jointly delivered by MOSAIC, the Vancouver Coastal Health Authority, the Ministry for Children and Family Development (MCFD), and the South Vancouver, Kiwassa, and Mount Pleasant Neighbourhood Houses. Rather than divide funding contracts among all the partners, MCFD, as the funder, requested that the agencies use a centralized management model but also decentralize service delivery. MOSAIC was chosen as the lead agency because of their large organizational capacity and their expertise in delivering an earlier version of the program. They are responsible for staffing, administration, and overall coordination of the program. Program staff are located at various program sites throughout the community. A Governance Council consisting of representatives from each partner agency meets quarterly to oversee the overall direction of the program. Below this is a Program Management Committee that supports the MOSAIC-based program manager in the day to day coordination of the program and ensures equal program ownership among all partners. Each executive director is also responsible for supporting program staff while they are on their site.

Karen Larcombe, Executive Director of the South Vancouver Neighbourhood House (SVNH), says the arrangement is working extremely well for her agency. She notes how it has allowed them to realize their vision of creating a service hub in their neighbourhood, *"In order to provide a continuum of services to our clients our board decided to bring partners on to our site rather than do everything ourselves. It's a win-win situation."* Clients of the Building Blocks program now have access to all the services that SVNH provides in addition to those provided by MOSAIC.

Larcombe believes that having MOSAIC as the lead agency has provided a strong incentive for SVNH's involvement. The partnership has been very attractive from a cost-benefit perspective as it would have required more responsibility and been more costly for them to do it themselves. In the past, SVNH has usually assumed the role of lead agency in managing joint programs. However, in this particular instance she has been very pleased with their lesser role, acknowledging, *"Although we don't have all the control, we're happy to leave someone else to manage the project and contract."*

Larcombe suggests that small organizations with limited administrative capacity consider this form of partnership provided they are given an equal voice in the operation of the project. She advises other agencies to select their joint partners very carefully by choosing people and agencies with whom they share values and have a history. She also recommends formalizing the partnership through a written agreement to offset any natural power imbalances between large and small organizations.

JOINT PROGRAM CASE STUDY
Abbotsford Community Services and Progressive Inter-Cultural Community Services
Legal Advocacy Program

Traditionally, partnerships initiated by a funder have not always had the same degree of success as those initiated by the partners themselves. However, the following case study is an example of a successful funder-driven partnership between Abbotsford Community Services (ACS) and the Progressive Inter-Cultural Community Services Society (PICS) in Surrey.

Both organizations had been independently offering a legal advocacy program for seasonal workers in the Fraser Valley for many years. Securing core funding, however, was an ongoing challenge until the Law Foundation of BC offered to add the service to their roster of core programs. This offer came with the condition, however, that the two agencies combine their programs to reduce duplication. After several months of discussions, both parties eventually signed a memorandum of understanding. ACS assumed the role of the lead agency, primarily because they had a longer history as an organization and a larger infrastructure. Program staff are now employed by ACS but the Surrey-based employees report to the PICS program manager. The project is governed by a joint management committee that meets quarterly composed of the two program managers from ACS and PICS and two lawyers who supervise the project. Every year, ACS gives PICS a lump sum to administer their portion of the program, as determined in the annual budget.

Manpreet Grewal, Manager of Multicultural and Immigrant Services of ACS, has observed several benefits from this arrangement including better communication, less competition for funding between the two agencies, and the opportunity for shared problem-solving. Another unanticipated benefit is the ease with which staff from one program site have been able to cover the shifts of staff at other sites whenever required. They also need to send only one representative to community meetings and have a higher profile now that they can speak with one voice on issues.

Grewal notes that although the two agencies have different organizational cultures, this has not presented any insurmountable challenges to the relationship. She does note, however, that occasionally the distance between the two agencies requires additional time for commuting to meetings, etc. Grewal also recalls that the time required to establish the partnership was fairly significant at the beginning. In terms of areas of risk and liability, ACS is still responsible for those employees that operate out of the PICS location.

Grewal believes that some of the factors making this collaboration work are the personalities of the people involved and the common vision they share. She recommends that even though a partnership may be funder-driven, managers ensure there is buy-in from both organizations before they proceed.

ONLINE COLLABORATION

DESCRIPTION

The use of information technology (web pages, email, public discussion groups, private conferences[1], and online databases) to build online communities and collaborate in cyberspace.

GOVERNANCE

- usually by steering or advisory committee with representation from partners, end users, and funders
- may use a lead agency to administer grants and development contracts

ADVANTAGES

- establishes a foundation of technology that positions agencies and take advantage of new and advanced forms of technology in the future
- allows smaller organizations to keep pace with changes in technology through economies of scale
- reduces power imbalances among different-sized partner agencies
- reduced number of meetings outside of the office and travel time
- more time to digest online discussions thoroughly
- increased transparency and accountability of online discussions through archived postings
- opportunity to include more voices than traditional face-to-face meetings allow

DISADVANTAGES

- initial cost of hardware, software, and training of staff
- ongoing cost of system maintenance
- increased need for technical support personnel
- requires full-time staff to moderate private conferences and maintain current website content
- system can go down, unreliability
- success hinges on human behaviour and whether people actually use it
- need to get as many partners online as possible

POTENTIAL BENEFITS

- promotes increased communication and information-sharing among partners on a wider geographical level
- a tool for developing community networks in remote regions
- faster access to information
- public discussion groups create an online forum for members, clients, and the general public to discuss relevant issues
- agencies can quickly send information and updates to their partners, members, and clients
- presents opportunities for additional spin-off partnerships

POSSIBLE CHALLENGES AND PITFALLS

- anticipated levels of synergy may not be as pronounced as with face-to-face interaction
- may be a steep learning curve for individuals not familiar with the new technology
- restricted to those individuals who have access to the Internet, currently the more affluent and educated groups of society
- private areas restricted by passwords may present a barrier to use
- lack of funding for development and management of the partnership
- securing ongoing funding

[1]A private, electronic meeting space that is open 24 hours a day, seven days a week.

ONLINE COLLABORATION (cont'd)

RISK/LIABILITY

- financial risk of investing in new technology that is not used to its full potential
- online communities present special liability concerns
- usage policies should be prepared and reviewed by an attorney familiar with intellectual property and corporate law
- risk by association as the agencies' reputations become more closely linked
- prepare a partnership agreement or memorandum of understanding detailing roles and responsibilities and have it reviewed by an accountant and/or lawyer
- include clauses regarding decision-making, conflict resolution, and termination of the relationship

AREAS OF POTENTIAL COST SAVINGS

- no real cost-savings as information technology, technical support, and related training are net budget expenses

TIME TO IMPLEMENT

- approximately one year or more depending on level of sophistication of system

COST OF IMPLEMENTATION

- depends on the level of sophistication of system, number of organizations participating, and their technical requirements
- negotiate a competitive package for hardware, software, connectivity, and training through the partnership

ORGANIZATIONAL AUTONOMY

- high

TIPS

- partners should set specific expectations about how and when their work will be done online, technology will not increase the productivity of a collaboration if there is no strong reason to interact
- tailor system to meet the needs of the end user first and then develop the technology
- introduce new software through small and persuasive uses in order to develop comfort and regular use
- ensure system can be expanded to adapt additional technology in the future

CASE STUDIES

- www.settlement.org

ADDITIONAL RESOURCES

- James, M. & Rykert, L. (1997) *Working Together Online.* Toronto, ON: Web Networks.
- James, M. & Rykert, L. (1998) *From Workplace to Workspace.* Ottawa, ON: International Development Research Centre.

ONLINE COLLABORATION CASE STUDY
www.settlement.org

Between 1999 and 2001, the Ontario Council of Agencies Serving Immigrants (OCASI) and several partners launched Settlement.org, an innovative website designed to respond to the needs of newcomers and settlement workers in Ontario. The website has three main objectives: to improve the quality of information and services provided to newcomers, to strengthen the knowledge and expertise of settlement agencies and workers, and to enhance communication and collaboration within the sector.

Settlement.org was created through a partnership between OCASI, Citizenship and Immigration Canada (CIC), several private computer consultants, a private training firm, and Toronto's Community Information Centre. It was originally part of a broader computerization project funded by CIC that included the installation of computer hardware, software, local area networks, and telecommunications equipment in over 90 locations throughout Ontario, including 72 community agencies. The project also designed and delivered software training for more than 400 settlement workers across the province plus provided network training for a technical liaison person in each participating agency.

Settlement.org is actually two websites: a public Internet site for newcomers to Canada (in English and French) and a private Extranet site for settlement workers. The Internet site contains useful links, frequently asked questions (FAQs), downloadable forms, publications, and a comprehensive database of information for newcomers and those working in the area. It also features several online discussion groups in key topic areas. The Extranet site was created to provide a private electronic community for settlement workers where they can post events and workshops, make contacts, discuss current issues, find answers to FAQs, download forms, publications, and funding applications, and access a database of organizations and job postings.

The project required approximately $720,000 in start-up funding and one year for development. On-going operating costs are presently $350,000 annually which continues to be received from CIC. A total of five full-time staff are responsible for website coordination and content, outreach marketing, and overall project coordination.

The many benefits observed include improved access to information for settlement workers and newcomers and the increased used of information technology by settlement agencies. In the constant search for new and relevant content, the site has also been instrumental in facilitating the development of website content and outreach partnerships with other organizations, such as a new Settlement and Newcomer Services Portal with 211Toronto.ca.

One unanticipated obstacle has been the lower than expected use of the Extranet site by settlement workers. As Marco Campana, Content Coordinator, reflects, *'We had a 'if you build it they will come' mentality and that didn't happen."* Over the years, settlement workers came to use the public site more because of difficulties with the Extranet password access and the need for ongoing current content for the Extranet. Settlement workers also told staff that the website did not necessarily save them time when they could just pick up the phone or walk across the hall to ask a colleague a question. Settlement.org staff are aware of the need to spend a great deal of time keeping site content current (which is a huge task) and moderating and facilitating use of the site and discussion groups in order to encourage greater use. They are currently moving 90% of the Extranet's content over to the public site in that hopes that settlement workers' use of it will increase to the point where they provide more active direction regarding what items and services they would like to see from the site.

www.settlement.org (cont’d)

Occasionally concerns are raised about the possibility of Settlement.org replacing front-line settlement workers but Campana asserts that the opposite is true. He notes that the site currently receives 2,000 unique visitors a day and has, in all likelihood, referred more newcomers to agencies rather than taken them away.

Campana advises groups considering similar large or small-scale projects to choose a base of technology that is both sound and scalable, i.e. it can be expanded and adapted to meet changing user needs and advances in technology. He also strongly suggests that, as a crucial first step, groups determine the needs of their end users first before developing the technology to meet these needs.

Debbie Douglas, Executive Director of OCASI, believes that this partnership has been successful because each partner shared the same goals. She says, *‘We learned that partnership as a process required flexibility, patience, compromise, and at times a great deal of stubbornness to ensure you were being heard. We came to the table with differing levels of expertise and in the process recognized that all were important to the successful outcome of the project.”*

COALITION

DESCRIPTION

The temporary alliance of distinct organizations and individuals who have united for a special purpose or common cause, usually to effect policy change around a particular issue.

GOVERNANCE

- usually by a steering committee who speaks publicly on behalf of the coalition
- may hire a coordinator to manage administration
- may choose a lead agency to house the coalition and supervise staff

ADVANTAGES

- a loose and flexible form of collaboration
- can accommodate a large number of partners and a broad range of sectors
- creates perception of broad community support
- can mobilize support and act quickly around a specific issue

DISADVANTAGES

- potential conflict if diverse partners and personalities involved
- consensus-building can be time-consuming
- cumbersome to manage if a large number of partners
- places increased demands on the administrative and staff resources of lead agency
- can be a net drain on the resources of participating agencies

POTENTIAL BENEFITS

- strength in numbers
- opportunity to work on root causes and achieve policy change
- increased credibility and recognition of issue
- increased media attention
- increased access to policy and decision-makers
- increased information-sharing and networking
- time-saving division of labour and reduced duplication of activity

POSSIBLE CHALLENGES AND PITFALLS

- loss of momentum or direction
- lack of vision or clear goals
- inconsistent representation/attendance
- need to provide partners with ongoing value for participation
- lack of decision-making authority around the table
- inflexibility to adapt to changing situations
- lack of central coordination
- lack of trust among partners
- unequal sharing of workload or contribution of resources by partners
- need to manage the interests of partners with diverse sectors, funders, and/or mandates
- unanimous agreement not always possible
- lack of funding for development and management of the partnership
- securing ongoing funding

COALITION (cont'd)

RISK/LIABILITY

- the line between advocacy and mission must be managed carefully
- risk by association as reputations become more closely linked
- even if it is a loose coalition, prepare a partnership agreement or memorandum of understanding detailing roles and responsibilities and have it reviewed by an accountant and/or lawyer
- include clauses regarding decision-making, conflict resolution, and termination of the relationship

AREAS OF POTENTIAL COST SAVINGS

- aside from reduced duplication of activity, cost-savings are not generally evident with this model

TIME TO IMPLEMENT

- must be implemented quickly in order to have maximum effect

COST OF IMPLEMENTATION

- depends on size and scope of coalition

ORGANIZATIONAL AUTONOMY

- high

TIPS

- ensure the coalition has the capacity to make quick decisions in order to be responsive
- keep the number of issues addressed manageable
- keep membership loose to build broad support
- focus on common values, vision, and outcomes

CASE STUDIES

- Working Group on Poverty (large coalition)
- Immigrant Sector Council of Calgary (small coalition)

ADDITIONAL RESOURCES

- Winer, M. & Ray, K. (1994). *Collaboration Handbook: Creating, Sustaining, and Enjoying the Journey.* Saint Paul, MN: Amherst H. Wilder Foundation.
- Forsythe, J. (1997). *A Guide to Coalition Building*. (http://www.cypresscon.com/coalition.html)

COALITION CASE STUDY
Working Group On Poverty

In 1995, the BC provincial government introduced legislation instituting a three-month eligibility waiting period for income assistance for individuals arriving from out of province. The major impact of this legislation on refugee claimants prompted MOSAIC and other community organizations to quickly form the Coalition for Refugee Access to Income Security which then became the Working Group on Poverty (WGOP) in 1997. WGOP is a loose coalition that has counted more than eighty immigrant-serving agencies, anti-poverty organizations, community-based services, social research organizations, funders, individuals, and even government policy makers among its ranks over the years. Membership in the coalition is flexible and partners are free to join and leave at any time. The coalition initially received funding from the United Way, the Vancouver Foundation, the Ministry for Human Resources, and other private foundations. Currently it is supported by Status of Women Canada. The goal of WGOP is to mobilize members and the community around the issue of poverty by encouraging dialogue, debate, and strategic action. It is overseen by a steering committee of six who direct the work of the coalition and its one paid Director.

MOSAIC initially became involved in WGOP because of its direct relevance to their target population. Over the years, they have played a key role in sustaining the coalition by providing office space and an employment contract for the Director. Eyob Naizghi, Executive Director of MOSAIC, feels that their participation in the WGOP has given MOSAIC the opportunity to bring attention to the issue of poverty and specifically how it affects immigrants and refugees. It has allowed them to bridge their work in this area with other mainstream organizations, increasing awareness of immigrant and refugee concerns on a broad level. For example, the WGOP conducted a research study that corrected several misconceptions around new immigrants and poverty.

The largest challenge the WGOP has faced over the years is a lack of funding. In recent years, this has become a significant challenge, causing the Director to be cut back to part-time. Naizghi acknowledges that the coalition was more effective in its earlier years. He notes that the label of "special interest group" has made it more difficult for WGOP to engage the government in dialogue. As the partner that houses the coalition and supervises its staff, MOSAIC is also responsible to a greater degree than the other partners. Naizghi points out that this responsibility presents a significant cost to the organization in terms of additional staff time and administrative resources. However, he feels the benefits greatly outweigh these challenges as there is a direct information flow between the WGOP Director and front-line MOSAIC staff that ensures that both are working with current and relevant information. He also notes that having such a close relationship with what is perceived as an advocacy organization raises concerns for some about the organization's charitable status. However, MOSAIC has not experienced any problems to date in terms of their relationships with funders or government policy makers. Naizghi strongly believes this form of public engagement is part of MOSAIC's mandate as a civil society organization functioning in a democracy.

Naizghi states that one of the factors that has made this coalition work is the open, inclusive nature of its membership, which has allowed them to build a large coalition. He advises other coalition-builders to know the members they are appealing to and to work to ensure that all receive value for their membership since it does require a commitment of time and resources to participate. He also suggests making the vision and mandate of the coalition very clear and to develop terms of reference early on in the process.

COALITION CASE STUDY
Immigration Sector Council Of Calgary

In 2000, six funders commissioned an evaluation and system overview of services to immigrants in Calgary. Following the release of this report in 2001, an inter-sectoral council of representatives from immigrant-serving agencies, ethnocultural associations, and various levels of federal, provincial, and municipal governments was created to begin implementing the report's recommendations. Since there were a large number of ethno-specific associations who wanted to be involved, a separate ethno-specific sub-committee was created that had one seat on the Council. The Council developed terms of reference to guide their planning and meeting process for the next two years that specifically outlined the team's main tasks, time commitment, responsibilities, membership, sub-committees, meeting schedules, co-chairs, and other items.

In addition to their work implementing the various recommendations to improve immigrant services, the Council developed a System Logic Model to represent the current functioning of the immigrant-serving system in Calgary including inputs, activities, outputs, outcomes, indicators of success, and measurement tools. It also created a brochure entitled *Services for Immigrants in Calgary* to provide a unified information source so that people in Calgary would be aware of the array of settlement services that immigrant-serving agencies provide.

Following their two-year tenure, Council members completed a survey evaluating their activities. The majority of members felt that the quality of partnerships between funders, ethno-specific agencies, and immigrant-serving agencies had improved as a result of the Council. They also felt that funding for immigrant services and programs had increased as a result of the Council's efforts and that the funding process had become more transparent. Only half, however, felt that they had been successful at establishing core funding for immigrant services and only one-third believed the Council was effective in increasing the availability of multi-year funding. Members felt that overall, while some progress was made towards implementing the original recommendations, it was less effective in creating a seamless client-centred system of services for immigrants. On the whole, however, members felt that their participation had been a valuable use of their time and that they should continue to meet bi-monthly.

Fariborz Birjandian, Co-Chair of the Alberta Association of Immigrant Serving Agencies and a member of the Council, feels the Council has been successful in increasing communication with funders and advocating for the needs of the settlement sector. In one instance, he notes how the immigrant-serving agencies participating in the Council were able to influence a funder to reverse what was widely perceived as an unfair funding decision. In his opinion, the Council was also effective in reducing the competition among immigrant-serving agencies, improving relations between ethno-specific associations and immigrant-serving agencies, and increasing the profile and credibility of settlement workers. He advises that in order for an inter-sectoral collaboration like this to work it must have good leadership and recognize that it takes time to build trust.

The Council is now planning a new direction and re-drafting their terms of reference. They plan to broaden membership to include other non-immigrant-serving organizations who hold similar principles and values, for example, Diversity Calgary. They will continue to implement the original recommendations by identifying strategies to address the service gaps identified and to understand and address government policy issues that affect the sector.

CO-OPERATIVE

DESCRIPTION

A legally incorporated business owned and controlled by its members. Each organization pays a one-time membership share set by an elected board of directors. Co-operatives that do not pay a dividend to members may be incorporated as a nonprofit and do not pay tax on accumulated surplus provided the surplus is returned to the activities of the co-operative.

GOVERNANCE

- Co-operative Rules and Memorandum of Association (similar to a society's constitution and by-laws)
- individuals named to a board of directors
- decision-making is one-member one-vote, regardless of investment

ADVANTAGES

- philosophy is congruent with nonprofits, based on collective decision-making and community
- can solicit funds and contracts as one entity
- smaller agencies have an equal voice
- structure remains intact if members come and go
- source of capital from one-time member contributions
- joint finances are distinct and separate
- positions collaboration to embark upon a for-profit enterprise
- members choose to be as active as they wish

DISADVANTAGES

- creates an extra level of bureaucracy for the collaboration
- places large demands on executive director's time
- cannot receive charitable status for joint fund-raising and donations
- if one member of the co-operative opts out, their share must be redeemed from the co-op's working capital which can be difficult depending on the amount of the share
- requires a minimum of five members to set-up
- agencies may have difficulty investing membership share when funds are in short supply

POTENTIAL BENEFITS

- operational cost-efficiencies
- higher visibility and community profile
- opportunities for enhanced service delivery, continuum of services, reduced duplication
- increased information-sharing and networking
- reduced isolation of smaller organizations
- decreased competition for funding

POSSIBLE CHALLENGES AND PITFALLS

- convincing boards to participate
- managing interests of partners with diverse sectors, funders, and mandates
- concern that larger agencies will 'take over"
- 'turf battles"
- relationship can be affected by changes in leadership
- need to provide members with ongoing value for participation
- outside agencies may find it threatening, fears of a 'juggernaut"
- the public and donors may be confused with the arrangement
- lack of funding for the development and management of the partnership
- securing ongoing funding

CO-OPERATIVE (cont'd)

RISK/LIABILITY
- risk is equally distributed among all members
- liability is limited to the value of shares a member holds

AREAS OF POTENTIAL COST SAVINGS
- primarily through economies of scale, e.g. bulk purchasing

TIME TO IMPLEMENT
- one year or less

COST OF IMPLEMENTATION
- depends on cost of membership share
- co-operative incorporation fee

ORGANIZATIONAL AUTONOMY
- high

TIPS
- obtain technical assistance on developing co-operatives
- troubleshoot potential problems ahead of time and build these into the memorandum of understanding
- choose partners and develop collaboration **before** it is necessary or forced
- focus on common values, vision, and outcomes

CASE STUDIES
- Islands Community Services Co-operative
- Kootenay Boundary Regional Resources Co-operative

ADDITIONAL RESOURCES
- BC Co-operative Association. *Cultivating Co-ops: An Overview of Co-operatives and their Role.* (www.bcca.coop)
- BC Registrar of Companies. *Incorporating a Co-operative Association in British Columbia.* Government of BC.
- United Community Services Co-operative (www.ucscoop.com)

CO-OPERATIVE CASE STUDY
Islands Community Services Co-op

In early 2003, several community agencies on Vancouver Island met to talk about how they might respond in a coordinated fashion to the dramatic changes in public policy, service systems, and funding levels that were affecting their agencies. Their eventual response was to form the Islands Community Services Co-operative in June, 2003. Co-op members are registered not-for-profit organizations that provide community, social, and health services to the communities of Vancouver Island and the Gulf Islands. Two goals of the co-op are to maintain nonprofit services in communities and reduce the isolation that many community groups have been feeling amidst the budget cuts.

The agencies involved chose to create a co-operative structure because it allows independent organizations to have a shared and equal voice in activities that further their missions. A primary role of the co-op will be to act as an umbrella agency, allowing members to partner on Requests For Proposals (RFPs). Further, a co-op fits with the provincial government's expressed preference for the private sector while still allowing members to maintain their status as nonprofits. From a financial perspective, a co-op also requires that members pay a share only once and avoids on-going membership fees. Although a similar province-wide co-operative already exists (the United Community Services Co-operative or UCSC), members wanted to create their own entity that was both regional in scope and island-based.

It has taken the co-op approximately one year of meetings and discussions to receive official co-op status and create a solid base of membership. Anywhere from ten to twenty organizations currently attend meetings and another thirty receive regular communications about the co-op. Founding members have chosen to initially build the membership slowly by invitation until they have more resources. Each member pays a one-time share of $50 per $50,000 of budget to a maximum of $600. The co-op is governed by a board of seven representatives selected from the member agencies. Although they have not received any funding to assist with its start-up, it is an acknowledged need. The co-op presently has several plans for shared activities around quality assurance and accreditation, advocacy, shared human resources and information technology, and relationship-building with funding bodies.

Jean McRae, Executive Director of the Inter-Cultural Association of Victoria (ICA) and a founding member of the co-op, feels that her membership has already demonstrated benefits such as increased information sharing and reduced isolation. Another unexpected benefit has been the mutual support that executive directors have received from their peers at co-op meetings. More specifically, the co-op provided ICA the opportunity to bid on a contract with another organization they wouldn't normally have partnered with geographically. ICA has also been pleased to see other mainstream member agencies since consult with them regarding the accessibility of their services to immigrant and refugee populations. In the future, ICA anticipates being able to partner on more RFPs through the co-op rather than compete with each other. As the largest immigrant-serving agency on the island, ICA finds they frequently must take on the role of the lead agency on various joint settlement projects because of their increased organizational capacity. This, however, sometimes places an additional administrative burden on ICA that McRae hopes the co-op will be able to lessen and make these shared projects more equitable.
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The main challenge with the co-op has been people's limited ability to devote time to it. Smaller organizations in particular have difficulty being involved to the extent they would like to. Given that all meetings occur in Nanaimo, distance also presents a difficulty for certain members. The cross-sectoral nature of the co-op can also be a challenge. For example, members have different ministry funders and the concerns of one funder will sometimes dominate the discussion. In the future, the members will also have to decide on a process to decide which organizations will get to partner on a competitive RFPs.

For the moment, however, McRae appreciates having a structure where ICA can make a difference and do something positive during a stressful time for nonprofits. As she says, *"It's a feeling like we're building something rather than tearing it down."* She advises that groups be realistic in finding ways to collaborate that provide real benefits to their organization. That is, given the additional time that it requires, groups should not collaborate simply for collaboration's sake. Similarly, they should not feel pressured to act to quickly, as *"pressure might get you there, but once you're there you really need a sense of trust."* She also advises obtaining technical assistance with setting up a co-op from the beginning from sources such as the UCSC.

CO-OPERATIVE CASE STUDY
Kootenay Boundary Regional Resources Co-operative

Like many community organizations across the province, small social service agencies in the West Kootenays are facing significant challenges. These include cutbacks in government funding and the trend for government ministries to tender service contracts to larger agencies both within and outside of regional communities.

In response to these concerns, nine agencies have come together to form the Kootenay Boundary Regional Resources Co-operative. The agencies chose to structure their collaboration as a co-operative because it balanced their priorities of preserving local community-based services and decision-making regarding service delivery with the need to collectively and effectively bid on service contracts. They also wanted something that did not require additional funds nor create an additional centralized infrastructure. Members were also attracted to the co-operative model of democratic control that gives each member one vote, as it ensures that smaller organizations are provided an equal say amongst larger ones. Finally, a co-op also positions the partners to embark upon a shared business enterprise for generating revenue in the future if they choose.

The co-op took approximately one year to form, with members meeting monthly. It is run by a volunteer board of directors drawn from the member organizations and uses a consensus-based decision model. The Memorandum of Association and Co-op Rules permit any non-paid member of a member organization to sit on the board.

Together with $28,000 in funds from CEDTAP (Community Economic Development Technical Assistance Program at Carleton University) and the local office of the Ministry for Children and Family Development, plus $7,500 raised from member contributions, the co-op was able to contract professional assistance to help them explore the different collaborative models available to them, prepare a feasibility study, and hire an Interim Coordinator one day a week.

Since the co-op is still fairly new it is too early to observe many benefits, however, it has already been successful in securing a grant from the Columbia Basin Trust to ensure that the Kootenay Boundary region was represented by interested residents from the area at this year's Rural Summit in Clearwater. This has demonstrated on a small-scale that the co-op is a viable vehicle for obtaining contracts and managing projects. Members also anticipate that they will also be able to pool their resources towards coordinating accreditation efforts, a move that is estimated to cost two-thirds less than if they did it on their own. There are also plans to explore sharing human resources expertise and to map out a mutual staff support system.

Andrew Jarrett, Executive Director of the Salmo Community Resource Society, estimates that his involvement with the co-op has required an additional 5-10% of his time. He identifies getting sufficient funding to develop the co-op as an early challenge that is still ongoing. While he feels it is too soon to observe any cost-savings, he cautions that this is not the principle goal of the co-op, saying, *'We want to do more with what we've got, not the same with less."*

Jarrett recalls that in the beginning there was a wide range of enthusiasm and readiness for joining the co-op that necessitated time to *'get everyone on the same page'.* He also notes that managing staff perceptions can be challenge. Talk of "cost-efficiencies" can make front-line staff nervous if the idea is not presented carefully. Other staff may negatively view the co-op as another layer of bureaucracy.

Jarrett suggests that other groups considering this model choose members with whom they have a long-standing relationship. He also advises that groups articulate a common set of core values early on in the process upon which to build the co-op, noting that this can help members to deal with the uncertainty that lies ahead.

ALLIANCE/CONSORTIUM

DESCRIPTION

An association between two or more agencies having common interests and governed by joint agreement who collaborate in any number of areas depending on their particular needs.

GOVERNANCE

- usually by a management committee with representation from executive directors and/or board members of each organization
- joint agreement may be as loose or as specific as partners wish it to be
- may choose to use a lead agency to secure grants and contracts or form an umbrella nonprofit society to formalize the association

ADVANTAGES

- an option for agencies wishing to achieve greater levels of collaboration without sharing office space or merging[2]
- flexible, allows new partners to build trust with a less formal association
- maintains grassroots identity of smaller organizations
- proactively positions agencies to respond quickly to upcoming collaboration opportunities
- can solicit funds and contracts if alliance is formalized as one entity

DISADVANTAGES

- places large demands on executive director's time
- increased number of meetings for executive directors and staff to attend outside of the office
- separate physical locations have less potential for combined synergy between programs and staff
- difficult to achieve regular communication and increased information-sharing among staff at different locations
- difficult to coordinate joint endeavours from a distance
- increased dependence on partners to carry through on commitments

POTENTIAL BENEFITS

- opportunities for enhanced service delivery, continuum of services, reduced duplication
- access to a wider base of skill and expertise
- increased information-sharing and networking
- economies of scale and cost-efficiency, e.g. bulk purchasing
- higher visibility and community profile
- more power speaking as one voice
- decreased competition for funding among partners

POSSIBLE CHALLENGES AND PITFALLS

- success often depends on the personalities and compatibility of key leaders
- relationship can be affected by changes in leadership
- convincing boards to participate
- concern that the larger agency will "take over"
- outside agencies may find it threatening, fears of a "juggernaut"
- need to provide partners with ongoing value for participation
- lack of funding for development and management of the partnership
- the public and donors may be confused with the arrangement
- disruptions if one partner leaves

ALLIANCE/CONSORTIUM (cont'd)

RISK/LIABILITY

- risk by association as the agencies' reputations become more closely linked
- partners must be able to tolerate uncertainty
- lead agency is ultimately accountable for administration of any shared grants and final reporting, responsible for proper oversight and support of joint projects
- the organization with the strongest internal controls and willingness should act as the lead agency
- ensure each partner has both directors' and operators' and sufficient third party liability insurance
- prepare a partnership agreement or memorandum of understanding detailing roles and responsibilities and have it reviewed by an accountant and/or lawyer
- include clauses regarding decision-making, conflict resolution, and termination of the relationship

AREAS OF POTENTIAL COST SAVINGS

- see Table 1

TIME TO IMPLEMENT

- up to one year (any longer than this and the alliance will lose momentum)

COST OF IMPLEMENTATION

- less expensive than a co-location or merger

ORGANIZATIONAL AUTONOMY

- high

TIPS

- start small and collaborate on shared programs as a first step to build trust and create early successes
- have an open and accountable partnership agreement that partners can buy into
- troubleshoot potential problems ahead of time and build these into the partnership agreement
- choose partners and develop collaboration **before** it is necessary or forced
- focus on common values, vision, and outcomes

CASE STUDIES

- South Fraser Community Service Alliance (small alliance)
- NEVCO (large alliance with umbrella society)

ADDITIONAL RESOURCES

- Spigelman, M., & Simces, Z. (2001). *The Partnership Toolkit: Tools for Building and Sustaining Partnerships.* Vancouver, BC: The Collaboration Roundtable. (available from http://www.mosaicbc.com).
- Mattessich, P., Murray-Close, M., Monsey, B. (2001). *Collaboration: What Makes it Work*, 2nd Edition. Saint Paul, MN: Amherst H. Wilder Foundation.

[2]As Winer and Ray (1994) advise, *"Resist creating new organizations complete with board structures and policy books. Instead organize to change the way people exchange information, make decisions, and allocate resources."*

TABLE 1: ALLIANCE/CONSORTIUM COLLABORATION IDEAS

Fundraising

a) Pool funds to hire a fund-raising professional.
b) Collaborate on special events and share volunteers. Channel proceeds through one lead agency.
c) Approach foundations and corporations as a single partnership.
d) Some organizations may have more clout in bringing in government or corporate dollars, while others may have more appeal with individual donors. Use the influence and reputation of higher profile organizations where necessary to solicit grants for joint projects that smaller groups may access and benefit from.

Marketing and Communications

a) Prepare a brochure that details the vision and goals of the collaboration to inform funders, members, and the general public.
b) Speak with one voice on issues to raise the profile and credibility of consortium partners. Design special letterhead for issuing joint statements.
c) Consider consolidating newsletters with similar topic areas and audiences to save on printing and postage costs. Members will benefit from reading about the activities and services of related agencies.
d) Coordinate newsletter mailing lists to avoid address duplications and reduce postage costs.
e) Determine the value of all external printing costs in an average year and jointly negotiate a better rate from one supplier.
f) Develop a common speakers bureau.
g) Share opportunities for mall displays and health fairs.

Volunteer Management

a) Hire a shared volunteer coordinator to recruit, train, and monitor volunteers for all agencies.
b) Maintain a central volunteer registry.
c) Pool funds for one large volunteer recognition event a year.
d) Open up generic training opportunities to volunteers at all agencies.

Staff and Board Development

a) Share in-house training opportunities.
b) Hire professionals to deliver training in-house to staff and directors from all organizations instead of sending only a few staff members to workshops.
c) Appoint one staff member to attend a conference or professional development opportunity and have them share their experience among other organizations in the consortium.
a) Access the expertise of other agencies in areas of need, e.g. diversity issues, policy development, corporate relations, etc.
b) Develop mentoring opportunities across agencies.
d) Offer board and meeting room space to the consortium at no charge or for a reduced rate.
a) Develop generic training programs across agencies.

Joint Programs

b) Commit to working together to reduce the duplication of existing and new programs. Establish regular communication among organizations to stay aware of new activities and develop joint programs wherever possible.
c) Consider amalgamating programs with small attendance into one large program across agencies or piggyback on other activities when possible, e.g. youth programs.
d) Collaborate on the development and distribution of new publications.
e) Present joint conferences, workshops, and community events.

Miscellaneous

a) Develop an inter-library loan agreement for the sharing of resource centre materials.
b) Form a buying club for purchasing office supplies and coffee.
c) Barter wherever possible to extend current resources, e.g. staff, volunteers, larger meeting space, storage space, and A/V equipment.
d) Register for common association memberships as one entity to save on membership fees.

ALLIANCE/CONSORTIUM CASE STUDY
South Fraser Community Service Alliance

In 2002 the BC Ministry for Children and Family Development began encouraging social service agencies to consider amalgamation as a way of operating more cost-efficiently. This was widely perceived by agencies as an attempt to downsize the social services sector.

Reading the writing on the wall and recognizing that the last minute is not an optimum time to form new partnerships, three agencies in the South Fraser region: OPTIONS Services to Communities, Peace Arch Community Services, and Deltassist Family and Community Services, decided to proactively form an alliance that would position themselves to thrive during the coming changes. The three executive directors from each agency already knew one another personally and their agencies had collaborated on a number of projects in the past. This contributed to the rapid formation of the alliance in eight short weeks. They chose to adopt an alliance model because it offered opportunities for economies of scale and a more integrated service delivery system while at the same time preserving the autonomy and community responsiveness of each agency.

The alliance has not developed a formal partnership agreement, but did issue a press release as a way of formalizing the partnership and making it accountable to the community. They may consider incorporating the alliance as a separate nonprofit society in the future so they may apply for grants and contracts as one distinct entity versus through a lead agency. The alliance initially received a grant for $8,000 from the United Way of which half will be used to cover the development of the new society. The other half is currently being used on the alliance's first official joint project which is to use the expertise of OPTIONS staff to translate the brochures of all three agencies into several different languages at a reduced cost.

Bruce Hardy, Executive Director of OPTIONS, says that although the social services sector has a very rich culture of co-operation at common tables and under the auspices of umbrella groups, he has observed very little actual agency to agency collaboration. He believes this is because agencies are not structured to deal with more integrated forms of collaboration and have concerns around accountability and liability. Although their catchment areas overlap slightly, for the most part the South Fraser Community Service Alliance partners represent different communities and would not compete for the same contract.

In terms of immediate benefits, the partners have combined their training sessions and are now providing more training for more staff for less money. One agency has also purchased a high quality color printer which it is permitting the other partners to use at a greatly reduced cost. As Hardy says, *"The cost-savings are not enormous at present, but then we're still finding our way."* He cautions, however, that if these types of collaborations end up not resulting in significant cost-savings that are re-invested back into services, they will fail to keep the attention and support of government and other funders.

One challenge the alliance will eventually have to face is defining a process for deciding which grants and contracts they will apply for collectively and which they will apply for separately through their own agencies. Another challenge is the new level of management created by the alliance that none of the three executive directors have time for alongside other immediate agency issues such as funding and accreditation. As a result, they mostly end up doing this work off the corner of their desk. Hardy estimates that he spends approximately half a day a week on alliance business which in his view is the bare minimum necessary. He also notes that there is the possibility that other agencies could feel threatened unless they know intention of a group forming an alliance.

Hardy credits the success to date of the alliance to the long history and trusting relationship the three organizations had together plus the decision to partner with agencies that did not significantly overlap in service and geographical area. He also feels that limiting the number of partners to three was a wise move to keep it manageable. He advises managers pursuing a similar collaboration to start small and proceed slowly, and to ensure they have their board's full support before they begin.

ALLIANCE/CONSORTIUM CASE STUDY
NEVCO

NEVCO, the Network of East Vancouver Community Organizations, is an alliance of approximately 80 community-based agencies that have come together to build their capacity collaboratively to address the rapid change and growing complexity they currently function in. Their goal is to influence, participate, and work together in a holistic and cost-effective manner as community organizations and neighbourhood residents in shaping, influencing, and making decisions to ensure that the interests and well-being of their community is being addressed and respected.

One objective of NEVCO is to increase the capacity of smaller community organizations to meet government RFP criteria with other partners. Following approximately two years of discussions, members chose to incorporate NEVCO as a separate nonprofit umbrella society in order to be able to compete for service contracts as a legal entity. They received start-up funding from the Vancouver Foundation and the United Way which has allowed them to hire a short-term contract coordinator. Eventually, NEVCO hopes that all the work will be conducted by its members. The NEVCO board is composed of twelve community representatives who proportionally represent the individual neighbourhoods in East Vancouver, plus 10 sector representatives (e.g. health/addictions, family and children, training and employment, etc.).

Storefront Orientation Services for Refugees (SOS) joined NEVCO out of their desire to face the challenge of contract reform as part of a united front of community-based agencies. Alexandra Charlton, the Centre Coordinator, anticipates that SOS can only become stronger through this alliance. She likens NEVCO to a potential "lifeline" for SOS in a funding climate that is likely going to get worse. In the near future, SOS hopes to partner with other NEVCO member agencies on ministry RFPs for service delivery by demonstrating how NEVCO agencies represent a clear continuum of services to clients.

Now that the hard work establishing NEVCO is complete, members anticipate that they will be able to mobilize and respond more quickly in a coordinated fashion to changes in government policy and funding. NEVCO has already demonstrated how it can speak effectively with one voice. The board was able to arrange a private meeting with Gordon Hogg, the Minister for Children and Family Development, to speak on the regionalization and contract restructuring process. Charlton notes that this is something that would be near impossible to achieve for a small community-based agency. NEVCO was also able to invite John McKnight, a well-known advocate of asset-based community development, to deliver a series of workshops with members and the community-at-large.

As one of the few refugee-serving agencies involved, NEVCO provides SOS with the opportunity to educate a large number of other service providers on the needs of refugees in one forum. However, since SOS is a small organization with few staff, Charlton is not able to attend as many NEVCO meetings as she would like. This is also a disappointment for other NEVCO members who appreciate the perspective she brings to the table as an advocate for refugees.

Charlton cautions that reaching absolute agreement among all partners in an alliance this large is not always easy. However, the positive attitude and perseverance of those around the table are clearly making this particular alliance work.

CO-LOCATION

DESCRIPTION

Two or more autonomous agencies sharing office space and common administrative functions (see Table 3).

GOVERNANCE

- one organization is usually appointed to act as a lead agency and sign the lease for office space[3]
- may also choose to form an umbrella nonprofit society to formalize the partnership (see Table 2)
- lead agency negotiates sub-lease agreements with other agencies in the partnership
- a management committee of executive directors from each agency oversees the activities of the co-location equally

ADVANTAGES

- greatest potential for cost-efficiencies through shared rent, administration, and other joint activities
- proximity creates more natural opportunities for staff interaction and joint programming
- more opportunities for peer networking among executive directors
- can incubate new or struggling organizations until they are financially stable

DISADVANTAGES

- places large demands on executive director's time
- smaller societies may have a harder time being heard
- greatest potential for clash of organization cultures and internal politics
- staff have less freedom with use of items such as board rooms, photocopiers, TV and VCRs
- can be significant reductions in staff productivity during the relocation phase[4]

POTENTIAL BENEFITS

- access to better office resources
- reduced isolation for smaller agencies
- smaller agencies gain greater credibility through association
- opportunities for enhanced service delivery, continuum of services, reduced duplication
- one-stop shopping for clients
- increased information-sharing and networking
- economies of scale and cost-efficiency
- higher visibility and community profile
- decreased competition for funding

POSSIBLE CHALLENGES AND PITFALLS

- clash of organizational cultures
- convincing boards to participate
- loss of agency identity
- client confusion with respect to which agency offers what services
- outside agencies may find it threatening, fears of a ʻjuggernaut"
- concern that larger agency will ʻtake over"
- relationship can be affected by changes in leadership
- disruptions if one partner leaves
- the public and donors may be confused with the arrangement
- ʻturf battles"
- lack of funding for the development and management of the partnership

[3]This is the most common governance model according to officials at the British Columbia Registrar of Companies. The use of a lead agency was also recommended in a study conducted by the Calgary Foundation exploring the feasibility of establishing centralized administrative services to nonprofit organizations.
[4]Singer & Yankey, 1991.

CO-LOCATION (cont'd)

RISK/LIABILITY

- lead agency ultimately accountable for lease and activities of unincorporated partners they are incubating
- the organization with the strongest internal controls and willingness should act as the lead agency
- ensure each partner has strong internal controls and standardized accounting and administration policies and procedures
- ensure each partner has both directors' and operators' and sufficient third party liability insurance
- keep a separate set of financial records for shared building and office activities
- risk by association as each organization's reputation becomes more closely linked
- prepare a formal partnership agreement or sub-lease detailing roles and responsibilities and have it reviewed by an accountant and/or lawyer
- include clauses regarding decision-making, conflict resolution, and termination of the relationship

AREAS OF POTENTIAL COST SAVINGS

- See Tables 1 and 3
- some cost-savings will be obvious immediately while others may take several years to become evident
- organizations should be prepared for a temporary drain on their cash reserves during the re-location process

TIME TO IMPLEMENT

- may take several months or more to establish

COST OF IMPLEMENTATION

- moving costs
- building renovations and space design
- printing of new stationery
- purchase of new telephone system and any other equipment upgrades
- additional expense of new shared staff salaries (for smaller organizations)

ORGANIZATIONAL AUTONOMY

- medium
- the necessary standardization of administrative systems in a co-location model may force smaller agencies to lose some aspects of their grassroots nature
- ensure partnership agreement/sub-lease promotes and reinforces the equality of all partners

TIPS

- have a clear understanding of how the co-location will operate before an actual move is made
- troubleshoot potential problems ahead of time and build these into the partnership agreement
- incorporate two months notice into sub-lease agreements
- anticipate growth in agencies when planning for space

CASE STUDIES

- Pacific Immigrant Resource Society (Lead Agency)
- Pacific AIDS Resource Centre (Umbrella Society)

ADDITIONAL RESOURCES

- Network of Multi-tenant Nonprofit Centres (http://www.nonprofitcenters.org)
- Clark, M. (2002). *Saskatoon Community Service Village: A Co-location Case Study*. Edmonton, AB: The Muttart Foundation.

TABLE 2: LEAD AGENCY AND UMBRELLA SOCIETY CO-LOCATION GOVERNANCE OPTIONS

	Lead Agency	Umbrella Society
Advantages	• most common governance model • least complicated and most flexible • easiest to implement	• society can receive charitable status, solicit funds directly, and receipt and distribute donations on behalf of all partners • may be easier to negotiate a lease for one entity versus several individual nonprofits • society remains intact if partners change
Disadvantages	• requires a large degree of trust in the lead agency • potential perceptions of inequality in the partnership • ramifications if lead agency leaves the partnership • some foundations do not make grants through lead agencies	• creates an extra level of bureaucracy • places high demands on executive directors' time • model is halfway to a merger and may encourage calls for the full amalgamation of partners • potential for confusion with funders and donors • possible public perception that donations to the umbrella society will be spent on administration rather than programs and services • potential to become too focused on the operation of the umbrella society
Risk/Liability	• the lead agency is ultimately liable if one group opts out of the agreement	• liability is limited to the umbrella society

TABLE 3: CO-LOCATION COLLABORATION IDEAS

Administration

a) Share common administration staff, e.g. receptionist, office manager, administrative and technical support.
b) Standardize administrative and accounting systems across organizations and share one bookkeeper. Maintain separate books for each organization and common administrative activities. An umbrella entity or host agency administers all joint funding received.
c) Consolidate payrolls and use a less expensive outside payroll service.
d) Harmonize financial year-ends and combine audits through one accounting firm.
e) Purchase office supplies in bulk.
f) Upgrade telephone system to handle an increased number of incoming calls. Agencies can maintain separate phone numbers. Reduce toll-free lines to one.
g) Combine office equipment leases and negotiate for better models with coded access and more favourable lease conditions.
h) Combine A/V equipment.
i) Place all computer stations on a network to use fewer printers.
j) Obtain a blanket insurance policy naming all partners, or move separate policies to one company to negotiate a better rate on premiums.
k) Negotiate for a group rate on employee benefit packages.

Office Space

a) Shared spaces can include:
   - reception area
   - library/resource centre
   - mail/photocopy room
   - staff kitchen/lounge
   - board room
   - training/multi-purpose room
   - small meeting room
   - storage
b) Place organizations within the space separately, or group them together according to common function, e.g. administration, programming, library.
c) Rent unused office space to additional sub-tenants.
d) Ensure entrances have coded key access and alarm systems for security.
e) Make unused meeting space available at cost or for no charge to other community groups during off-hours.

Staff

a) Combine certain part-time positions into shared full-time positions, e.g. librarian, administrative support, etc. When staff leave a position, decide whether to re-hire for that position or share an existing staff member from another organization.
b) Arrange for executive directors to rotate and attend various external meetings as appropriate on behalf of the collaboration, thereby reducing the amount of time that each executive director spends in outside meetings.
c) Share other positions, e.g. counsellors or intake workers.
d) Share summer employment students.
e) Share one copy of desktop publishing software and train one staff member to use it in-house. Organizations may individually contract or barter for this service hourly.
f) Small organizations can contract or barter with larger organizations for staff to perform specific functions on an as-needed basis.
g) Have a building newsletter or regular staff meetings/lunches to increase communication among organizations.

Library/Resource Centre

a) Centralize all libraries to offer a broader range of information and reduce duplication in book and periodical purchases.
b) Hire a shared librarian.
c) Upgrade cataloguing systems to a common database.
d) Promote the new library widely to achieve greater utilization of resources and offer a strong incentive for membership.

CO-LOCATION CASE STUDY
Pacific Immigrant Resource Society

When the Pacific Immigrant Resource Society outgrew their location at Britannia Community Centre ten years ago, they turned to co-location as an innovative way to secure both office space and a board room with their limited resources. Unfortunately, when they first looked at spaces on their own, they found they could not afford anything that adequately met their needs. It so happened that AMSSA was also looking for office space at the same time and an accidental co-location partnership was born.

Once a suitable space was located for both agencies, AMSSA signed the lease and negotiated a mutually agreeable sub-lease with PIRS. This sub-lease outlines the term of occupancy, rent and other operating costs, official use of the premises, use of the common areas, liability insurance requirements, after-hours security, communication and decision making, and a conflict resolution process. AMSSA bills PIRS monthly for their rent, copier and fax use, reception, mail, and janitorial services, and other miscellaneous costs. AMSSA also paid for the initial renovations to the space. The two groups meet occasionally throughout the year to discuss issues related to the co-location as they arise.

PIRS originally received $5,000 from the Ministry of Multiculturalism and Immigration to assist with their move although it is questionable whether or not funds for this purpose would still be available in today's funding climate. The entire process from initial discussions with AMSSA to moving in took approximately four months.

Jean Maloney, Executive Director of PIRS, believes that the primary benefits of this collaboration have been the administrative cost-savings they have observed while at the same expanding the size and quality of their office space. She also believes that PIRS enjoys a higher profile through their connection with AMSSA. For example, when a funder or government representative visits AMSSA, she gets a chance to meet them as well, something that would not happen if they were located on their own. She also notes that she saves time by not having to travel to AMSSA meetings.

Maloney credits the success of this co-location to the large amount of goodwill that exists between the two agencies. Both work in the area of immigrant services and have a similar size, mandate, philosophy, and sensitivity to diversity issues. She notes that when two organizations work in close quarters, success often comes down to compatible personalities and suggests that other groups partner with people they have a history with.

While they have not experienced any significant conflicts themselves, Maloney advises groups pursuing a similar arrangement to ensure that provision is made in a written agreement for adequate communication and conflict resolution. She also advises identifying potential problem areas early on in the partnership and addressing them proactively in the agreement.

Although the two organizations co-locate, they are still fairly separate in terms of their organizational culture and program activities. Maloney notes that there may be other opportunities to share resources that they haven't explored, such as hiring common administration staff and more bulk purchasing. Since moving into their original shared space together ten years ago, the two organizations have since experienced a second successful move together.

CO-LOCATION CASE STUDY
Pacific AIDS Resource Centre

The Pacific AIDS Resource Centre (PARC) was a nonprofit society created by three organizations sharing a building in downtown Vancouver: AIDS Vancouver, BC Persons With AIDS (BCPWA), and the Positive Women's Network (PWN). PARC was initially formed in 1992 as a limited company to create an equitable, business-like infrastructure for the co-location that would address staff and clients' concerns of equality in the partnership. Each partner had representation on a management committee that governed the joint affairs of PARC.

In 1994, on the advice of several lawyers, the limited company was dissolved and PARC evolved into two separate nonprofit societies. One society managed fund-raising, while the other dealt solely with administration. These two societies were later merged into one. The decision to move from a limited company to a society was based primarily on concerns around the transparent transfer of funds between partners and the necessity for the PARC entity to be able to accept and receipt donations from collaborative fund-raising. The move was also meant to resist potential pressure from funders to amalgamate the three partners into one agency.

Each agency sent an equal number of directors to stand on an umbrella PARC board. Most decisions were made by a management committee consisting of the three executive directors who met with the PARC board monthly. Initially there was a separate executive director for PARC but this position was later deemed to be unnecessary. Consensus-based decision-making was used in all meetings to help build communication and trust. Each partner was charged a management fee based on a formula for sharing rent, staff, the photocopier, postage, and long distance. Shared PARC staff (a receptionist, building manager, technical support, bookkeeper, and security staff) were seconded from the partner organizations and paid for through the management fees. The building lease was initially negotiated in the name of all three organizations at the request of the landlord but later leases were negotiated through the PARC entity.

Ross Harvey, Executive Director of BCPWA recalls the PARC arrangement as working well. Partners observed administrative cost-savings from economies of scale, e.g. a shared phone system, computer intranet, and security services. Another significant benefit for all partners was the one-stop shopping they were able to offer their clients. They found the close proximity allowed them to plan for services that were complementary and reduced duplication. Harvey remembers, "*We had an easier time getting the attention of funders, we could mount more plausible cases for funding because of the work we were doing.*" Marcie Summers, Executive Director of the Positive Women's Network (PWN), a small organization with four staff members, believed that one the main benefits for her organization was the increased credibility they received through their association with PARC. PARC was seen as one of the leaders in the HIV/AIDS field and it placed them in a better position to lobby around AIDS issues.

The arrangement was not without its challenges, however. As the smallest agency, PWN felt that occasionally the priorities of the two larger agencies would override theirs and on occasion they had to struggle to make their voice heard. Although they also acknowledged that if they were not a part of PARC they would be outside of the *'power and information loop"* and would likely have to struggle even harder. PWN also did not observe large cost-savings from the partnership. The arrangement locked them into major equipment leases and more costly office expenses than they felt they needed, such as a shared receptionist and new telephone system. Harvey also suspects that some of the administration costs with PARC were higher than necessary, citing computer and utility costs as an example. Some partners were also

Pacific AIDS Resource Centre (cont'd)

concerned about extensive renovations that were made on the leased building, wishing they had purchased their own building in the first place.

Summers remembers the PARC structure as too cumbersome and questioned whether it was necessary to have a separate society to represent the collaboration. For example, every decision had to pass through the PARC board before reaching the other three partner boards. The additional work involved with the collaboration was also a large drain on PWN's staff resources. In the beginning PARC business took up to 50% of Summer's time. Although this eventually decreased to 35%, this was time that Summers would have preferred to spend on PWN business. Rick Marchand, past Executive Director of AIDS Vancouver, remembered it as *"sometimes like running two agencies at once."* Despite an internal email system, communication within the building was also a challenge for all. Stephen Smith, Co-executive Director for AIDS Vancouver, believed that the three agencies had slightly different organizational cultures which affected how staff and volunteers interacted and the target group they served. They also found that clients were often confused about which agency offered what services. Smith says that being a part of PARC made it *"very difficult to brand and market our services as being distinct to our agency."*

PWN ultimately left PARC because of the above challenges and moved into their own space in 2000. In late 2002, AIDS Vancouver also requested to dissolve PARC but remain a sub-tenant in the building. One reason for this was the agency's need for more space and a desire to open service delivery locations closer to their target population. Although they have since opened up additional storefront operations, they continue to receive a tangible benefit from co-locating certain services in the same building as BCPWA. Finally, they also believed that a physical separation from PARC would help clients to better identify what services AIDS Vancouver provided.

The lease for the PARC building is now held by BCPWA who charges AIDS Vancouver for rent, the phone system, utilities, janitorial services, plus a ten- percent administrative surcharge. The relationship between AIDS Vancouver and BCPWA remains amicable and they continue to communicate and partner on projects. Where the offices were once integrated throughout the building, AIDS Vancouver now resides on the first floor and BCPWA on the second. Both Harvey and Smith note that despite continuing good relations with PWN, it was easier to collaborate with them when they were in closer proximity.

Harvey believes the biggest flaw with PARC was its ongoing attempt to function without a dedicated senior administrative position. This placed the management of PARC squarely on the shoulders of the three executive directors who could not afford to devote the time necessary to it. He also feels that the three partners outgrew their space in the building early on.

Since PARC has dissolved, the extent of earlier cost-savings has decreased for each agency. The number of staff positions that were previously shared has now doubled as each agency has hired their own. Both Harvey and Smith believe that since the relationship is now governed by a sub-lease, it requires very little of their time to administer. Despite the ups and downs of PARC, Harvey still encourages other organizations to consider co-location in its many forms, provided they have a clear operational agreement in writing and plan appropriately for growth. He commends other sectors that choose to address the current large-scale challenges faced by nonprofits in a co-operative and non-territorial manner. Smith recommends other managers to also consider co-location as an option for cost-sharing while at the same time ensuring there is still a tangible distinction between agencies in order to maintain agency identity.

MERGER

DESCRIPTION

A process whereby one or more societies dissolve and become part of another society, or when two or more societies dissolve and together form a new society.

GOVERNANCE

- an amalgamated board of directors

ADVANTAGES

- greatest potential for cost-efficiencies through shared rent, administration, and other joint activities
- can assist a struggling agency to survive
- smoothest to operate once restructuring is complete

DISADVANTAGES

- places large demands on executive director's time
- funders may not contribute at the same level as they did previously to independent organizations
- may result in some job losses
- dilemma of what to do with two executive directors
- can be significant reductions in staff productivity during the merger phase[6]

POTENTIAL BENEFITS

- opportunities for significantly enhanced service delivery, continuum of services, reduced duplication
- one-stop shopping for clients
- economies of scale and cost-efficiency
- higher visibility and community profile
- decreased competition for funding

POSSIBLE CHALLENGES AND PITFALLS

- clash of organizational cultures
- convincing boards to participate
- outside agencies may find it threatening, fears of a 'juggernaut"
- merging unionized and non-unionized staff
- managing staff perceptions and fears of job losses
- the public and donors may be confused with the arrangement

[6]Singer & Yankey, 1991.

MERGER (cont'd)

RISK/LIABILITY

- must take on the risks and liabilities of merged organization(s), e.g. an unstable or non-diversified funding base

AREAS OF POTENTIAL COST SAVINGS

- cost-savings may take several years to become evident, **if at all**[7]
- organizations should be prepared for a temporary drain on their cash reserves during the merger process

TIME TO IMPLEMENT

- approximately six months to two years to complete, depending on the urgency of the situation
- any longer risks loss of momentum

COST OF IMPLEMENTATION

- cost estimates for a merger can reach as high as $40,000 if there are leases to break, new facilities to rent, severance payments, salary harmonization, new stationary, etc. [8]

ORGANIZATIONAL AUTONOMY

- low

TIPS

- ensure boards and staff are fully on-side
- develop a business plan with a long-term vision
- anticipate agency growth when planning for space
- focus on common values, vision, and outcomes
- choose merger partners **before** it is necessary or forced

CASE STUDIES

- Manitoba Interfaith Immigrant Council and Manitoba Citizenship Council
- Delta Youth Services and Boys and Girls Club of Delta

[7]According to McLaughlin (1996), there appears to be little or no real savings observed from a merger, only improvements in service, *'If it's savings you want, do an operations review and forget about merging."* (p. 25)

[8]McClintock, 1996.

ADDITIONAL RESOURCES

- La Piana, D. (1994). *Nonprofit Mergers: The Board' s Responsibility to Consider th Unthinkable*. Washington, DC: National Center For Nonprofit Boards.
- La Piana, D. (2000). *The Nonprofit Mergers Workbook: The Leader' s Guide to Considerinḡ Negotiating, and Executing a Merger.* Saint Paul, MN:Amherst H. Wilder Foundation.
- McLaughlin, T. A. (1998). *Nonprofit Mergers & Alliances: A Strategic Planning Guide*. New

MERGER CASE STUDY
Manitoba Interfaith Immigration Council

In 1993 a drastic reduction in federal funding for immigrant and refugee services led the Manitoba Interfaith Immigrant Council (MIIC) and the Manitoba Citizenship Council (MCC) to consider a strategic alliance. Informed that there would be only one contract tendered for services, the two organizations recognized they were facing a case of either merging or competing against one another, effectively putting the other out of business. As Marty Dolin, Executive Director of the MIIC, puts it, *"It's amazing what you can do with a gun to your head."*

Unfortunately, the time available for planning the merger was only six months. Since one organization already owned a building, it made sense for the other to break their lease and move into the other' s facilities. The budgets of the two organizations were integrated while services and jobs were maintained, including those of the two executive directors who operated as co-directors. Each co-director was responsible for supervising their own staff.

Dolin believes that, on a functional level, the merger worked. Throughout the seven-year period the two organizations were able to enhance their services to clients by providing one-stop shopping. The cost-savings that were eventually observed following the merger were also enormous, despite the need to pay two executive directors and harmonize union and non-union staff salaries. He recalls that in some respects the merger also decreased his workload because he shared responsibilities with another executive director. In other areas, however, it required more of his time.

Dolin identifies two major challenges that the merger faced from the beginning: differences in organizational cultures and the inability of the two boards to work co-operatively. Although the two executive directors had a good working relationship, the cultures of the two organizations were very different. One was relatively hierarchical compared to the other. As time went on, this culture clash became more apparent and began causing morale problems among staff. Relocated staff were also uncomfortable moving in to the other building, saying it felt like they were "trespassing on someone else's property".

From the beginning, the two boards appeared to have fundamentally different conceptions of what type of merger was occurring. While one board expected the two agencies to fully amalgamate and form a new organization, the other board expected to consolidate the programs and staff of the one agency into their own. For example, when an integrated board composition was proposed, one agency was only offered two seats on a thirteen-member board. In the end, the one board recognized that an equitable merger was not going to occur, and in 2001 they dissolved the association.

Dolin thinks it's unfortunate that the merger did not continue as it was an interesting experiment that could have worked, especially after one of the co-directors retired. Dolin advises other groups to carefully develop both a business plan and a shared long-term vision for the merger. He also suggests they compare organizational cultures and work to ensure the partnership is equitable.

MERGER CASE STUDY
Boys And Girls Club Of Delta And Delta Youth Services

In 2001, Delta Youth Services (DYS) approached the Boys and Girls Club of Delta (BGCD) with a merger proposal. Their reasoning was simple: since both agencies served the same community with different programs, perhaps they could provide a more enhanced continuum of services if they amalgamated. At the time, DYS offered specialized clinical services and did not have a large connection with the community. Since they received almost 80% of their budget from the Ministry for Children and Family Development (MCFD), they also recognized the need to diversify their funding base. In contrast, BGCD was highly integrated into the community through their various club locations, but could benefit from greater access to the type of specialized services that DYS provided. Therefore the merger offered both organizations a significant opportunity to enhance their services to youth and families in the community.

The first step taken was to hire a consultant to perform an in-depth feasibility study and business plan, which involved consultations with staff, both boards, funders, and the community. An advisory group of community members was struck to obtain community input into the process. While both organizations were stable financially, their boards were very different. One was a policy board and the other was more hands-on. The executive director of DYS was also close to retiring.

The merger has experienced significant challenges. Early on in the process the President of DYS, a prime visionary and supporter of the merger, experienced a disabling stroke which was a tremendous setback for the process. Secondly, the Gaming Policy and Enforcement Branch and other funders informed the two agencies that they would not receive their equivalent amount of earlier funding as an amalgamated organization. Since this represented a substantial amount of funds, the official merger resolution has been placed on hold for two years until the Gaming Policy and Enforcement Branch can develop a new policy around amalgamated organizations.

In most respects, however, the two agencies have amalgamated unofficially. Sandra Gebhardt, Executive Director of BGCS likens it to running a company with two subsidiaries. There are two legal entities, two boards, two sets of books, but the staff, administration, and programs operate as one. She believes this arrangement has worked to date because the management and boards of both organizations have been willing to do so and there was no overlap in services. Both Boards meet on the same evening and at the end of the general discussion the individual boards meet to vote on and discuss their specific items. Two sets of agendas and minutes are prepared and approved. There is some overlap in individual directors but a different executive committee for each. Gebhardt sees it as her own personal challenge to get the two boards to think and operate as one. As she says, *'The logistics of overseeing two legal entities is my challenge to deal with. Right now, I need to get this group thinking together, because in two years they are going to be married. Right now they're just engaged."*

The amalgamation has yet to observe any cost-savings. Gebhardt believes this is because the organizations were already running very lean operations and there was little duplication to begin with. They may see cost-savings in a year or two once the restructuring process is finished. One clear observation, however, is that management's workload has increased. Another unknown is how the proposed regionalization and the service delivery restructuring process within MCFD will impact them.

The amalgamation has resulted in no job losses and obtaining staff support for the merger has not been a significant problem, although some harmonization of salaries was necessary. Early on a consultant was contracted to conduct a day of team building among staff. Staff was not required to move from their existing office locations.

In terms of benefits, Gebhardt believes the two agencies now have an improved and expanded service, a more diverse board, and a higher community profile. She's also observed that clients have been seen little or no disruption of services and are relatively unaware of the amalgamation process. While she wishes they could have merged sooner, she recognizes that the loss of gaming funds would have been too significant. Gebhardt believes the amalgamation has proceeded relatively smoothly so far because of the trust her management has placed in the process and the boards' willingness to follow this path as a means of building a strong organization that will survive in today's funding climate. She advises other managers to pay careful attention to staff throughout the process. She continues to be positive about the merger and is committed to seeing it through, even if requires managing two organizations as a joint venture indefinitely.

ADDITIONAL RESOURCES ON COLLABORATION

The Peter F. Drucker Canadian Foundation (1996). *Collaboration: A Critical Advantage for High Performance*. London, ON.

Mattessich, P., Murray-Close, M., Monsey, B. (2001). *The Wilder Collaboration Factors Inventory: Assessing Your Collaboration' s Strengths and Weaknesses*Saint Paul, MN: Amherst H. Wilder Foundation.

Taylor-Powell, E., Rossing, B., Geran, J. (1998). *Evaluating collaboratives: Reaching the Potential*. Madison, WI: University of Wisconsin - Extension. (available for download at http://cecommerce.uwex.edu/pdfs/G3658_8.PDF)

http://www.vskn.ca/commune/comm_collab.htm
A good general resource on collaboration with a step-by-step guide.

http://www.lapiana.org/index.html
This is a great site with a wealth of information on various "strategic restructuring" models.

http://www.wilder.org/pubs/collab_bibliography/collaboration_bibliography.htm
This is an extremely extensive list of collaboration resources compiled by the Wilder Foundation.

http://www.wilder.org/pubs/collab_wmiw_inv_tool/index.html
This is a great little online survey you can do in less than 15 minutes to assess how your collaboration is doing on twenty factors that research has shown improves success.

http://www.vichealth.vic.gov.au/default.asp?artid=538&tid=&level=
The VicHealth Partnerships Analysis Tool for evaluating and sustaining a collaboration.

http://www.infoforchange.bc.ca
This site has a section under "Adaptive Strategies" with several case studies of BC organizations innovatively dealing with change.

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McClintock, N. (1995). The urge to merge. *Front and Centre*, 2(6), 1.