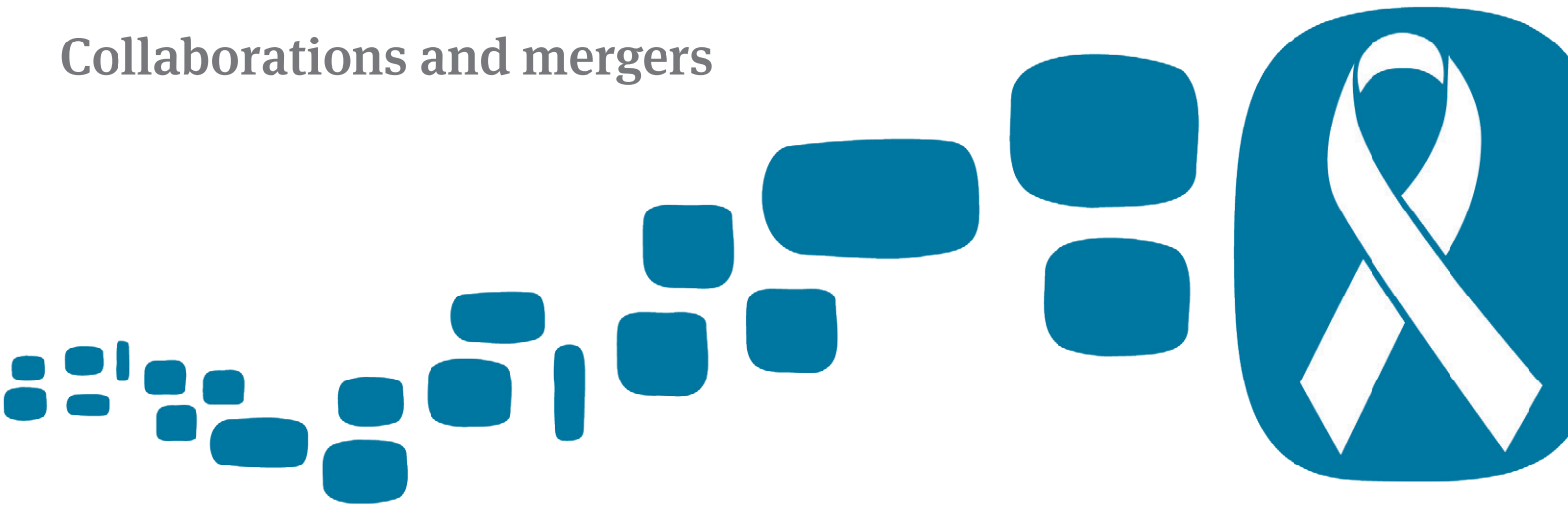




# Responding to change: taking opportunities

## Collaborations and mergers



A key aspect of strategic planning is the consideration of the opportunities offered through collaborations and mergers.

### Why collaborate or merge?

Nonprofit organisations may consider collaborations or mergers for a range of reasons to:

- Achieve a step change in service provision or facilitate growth
- Find partners to aid with successful bidding for public sector contracts
- Combine common functions in order to maximise scarce resources and cut cost
- Enable a more powerful voice in policy debates.

### What can collaboration deliver?

### How do you find suitable partners?

### What are the pitfalls?

### How will you demonstrate success?

Interest and activity in collaborations and mergers is growing fast in this difficult economic and political climate and nonprofit organisations need to know where to turn for expert help.

### Some key processes and challenges in collaborations and mergers:

- Strategic review and analysis – why collaborate and who with
- Engaging the key stakeholders – how will funders and commissioners respond?
- Driving the process – keeping focus and motivation
- Measuring the costs and benefits – does the process need funding?
- Planning – compatibility, risks, business plan, what are the deal breakers?
- Outline agreement and due diligence – when to deploy the legal and financial professionals
- Completion and communication – ensuring everyone is on board and signing the agreement
- Making it work – post agreement implementation, the main work starts here.



## The range of skills required from a trusted adviser might include:

- Strategic thinking and analysis
- Feasibility and developing options
- Business planning including cost/benefit analysis
- Governance review
- Organisational design
- HR support – including restructuring and TUPE
- Communications planning
- Implementation – including change and brand management
- Evaluation of outcomes and impact
- Coaching and mentoring.

### How to collaborate

Every organisation and collaboration is unique. But, having worked with so many organisations we know the steps most likely to achieve a successful outcome and the common roadblocks that can prevent effective collaboration. Leadership, focus, strategic vision, cultural differences and clarity of objectives are critical throughout the process – as are establishing a clear process and timescale with the key stakeholders up front.

### Our 'trusted adviser' approach

The appointment of an expert and trusted external adviser can help create honest dialogue right from the start and at all stages of the process. The input required from your adviser may vary according to the nature of the collaboration/merger and the stage you have reached in the process.

Based on our professional experience, we have the capacity to judge objectively what will benefit our clients most – whether it is working with an individual organisation, bringing together multidisciplinary teams or advising a larger multi-client negotiation.

### Centre for Charity Effectiveness

Intellectual leadership: developing talent, enhancing performance

### About Cass CCE

Cass Centre for Charity Effectiveness (Cass CCE) is the leading nonprofit and philanthropy centre in the UK and has significantly enhanced the performance of hundreds of organisations and thousands of individuals across the nonprofit sector.

Combining our extensive practical experience with best practice, theory and research we deliver a world-class blend of postgraduate programmes, talent development and consultancy services.

Our consultancy services offer a wealth of experience, skills and knowledge from our strong and diverse team. Our consultants deliver leading-edge thinking, benefiting from theory but always grounded in practice to create real change in organisations.

### How we can we help

Cass CCE has an enviable record of working with charities, large and small. We support organisations in all sorts of different collaborative initiatives, whether developing bidding consortia, a vertical integration model or informal information sharing. We work as trusted advisers to support organisations: through the merger process; following a merger; or, to help decide that merger is not the way to go.

Please call or email us if you would like more information or an initial informal introductory discussion to see how we can help you.

For more information visit  
[www.cass.city.ac.uk/cce](http://www.cass.city.ac.uk/cce)  
or contact Matthew Guest  
at [casscce@city.ac.uk](mailto:casscce@city.ac.uk)  
**T:** +44 (0)20 7040 0901  
**Twitter:** @CassCCE