

Planning for Strategic Partnering and Collaboration

Impact100 Sonoma

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with

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Partner



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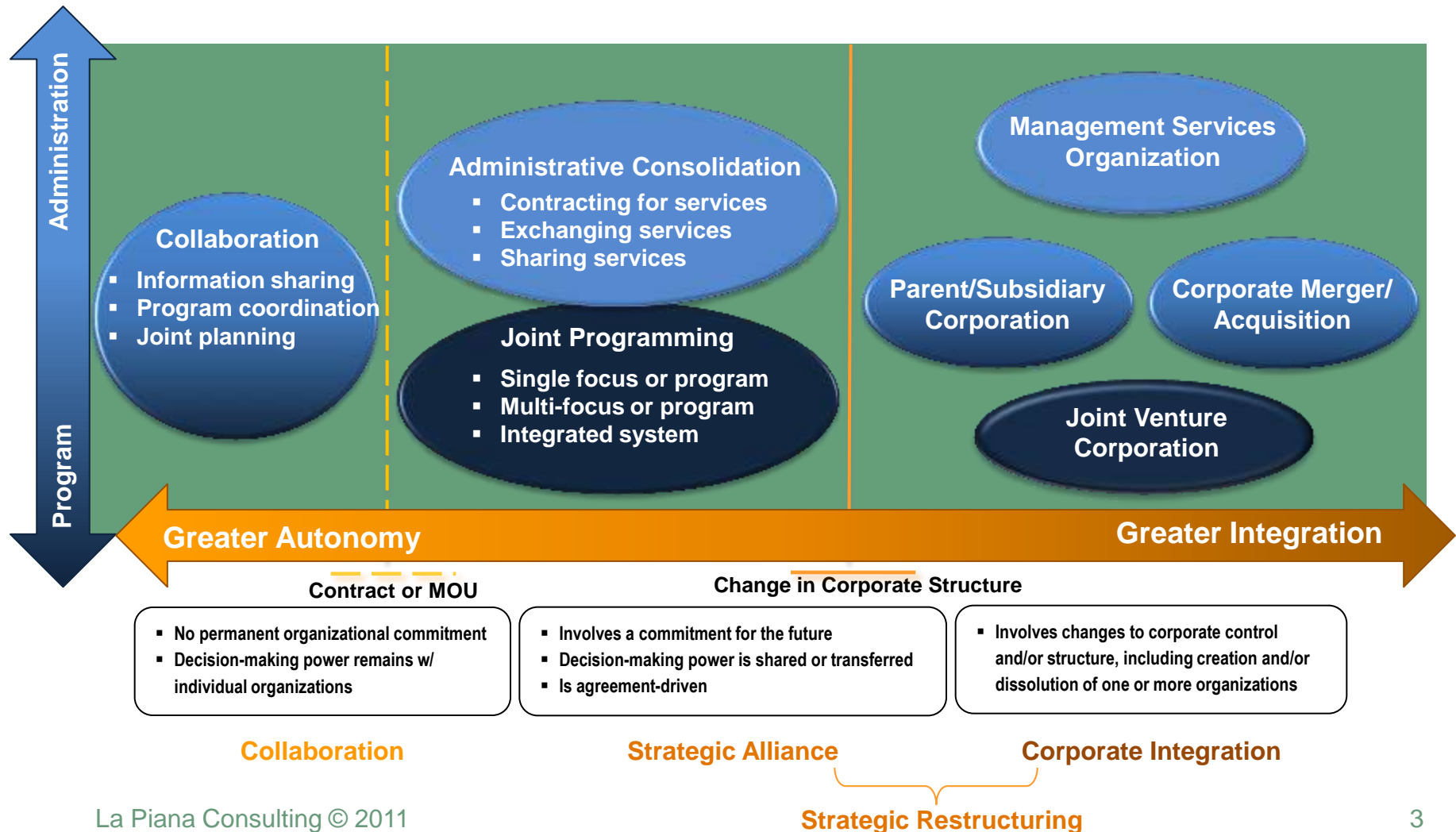
Overview of Strategic Restructuring

What is Strategic Restructuring?

The Partnership Matrix

Case Studies

The Partnership Matrix



Why Strategic Restructuring?

Strategic Restructuring Trends and Research
Critical Success Factors
Reasons to Consider Collaboration
Roadblocks to Strategic Restructuring

Why Do Nonprofits Consider Strategic Restructuring?

- Pursue New Opportunities
- Build Capacity
- Greater Client Impact
- Greater Access to Funding
- Increase Efficiency and Reduce Costs

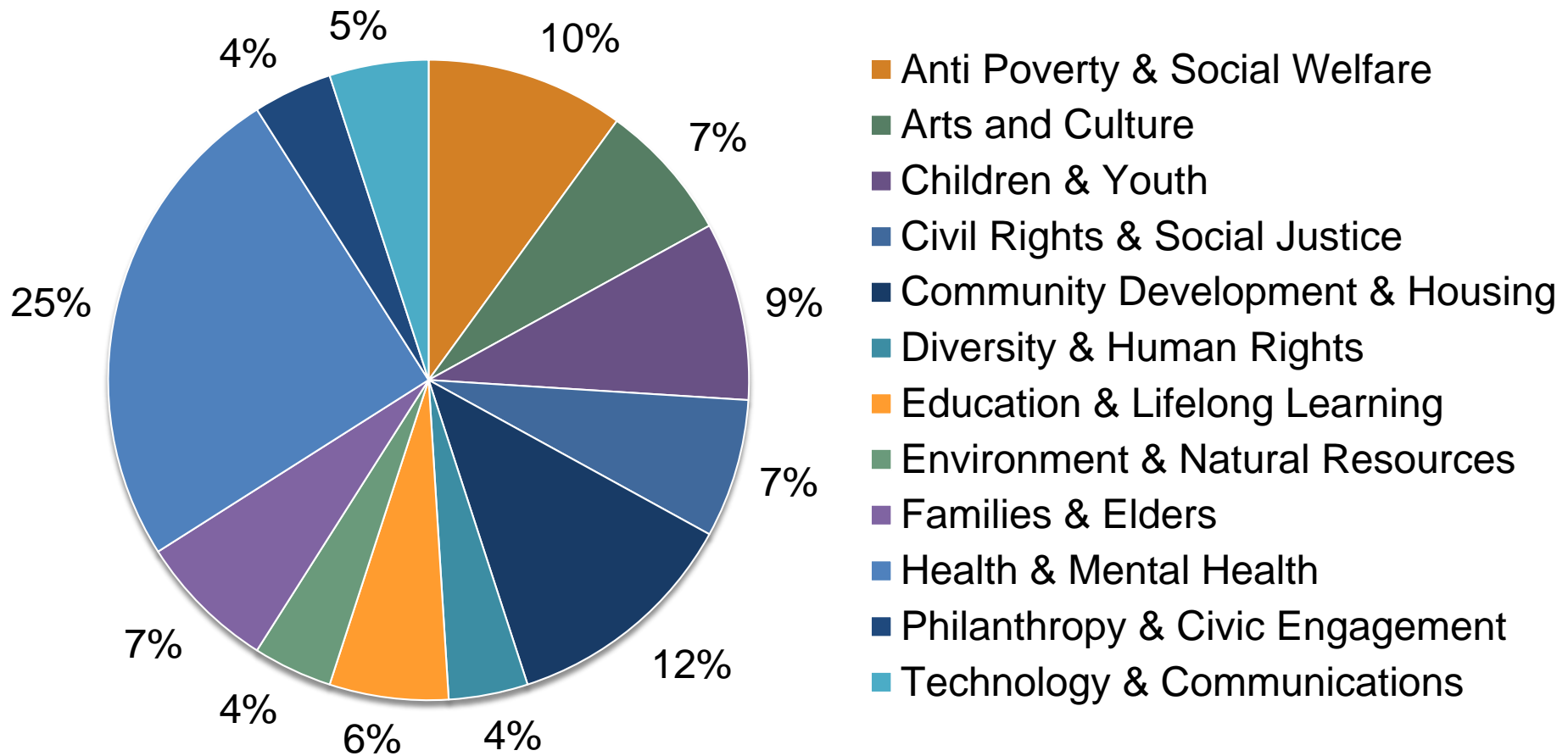


Current Trends in Strategic Restructuring

- SR as a competitive strategy
- Increased interest and activity across sectors
- Dramatic increase in mental health and social services
- Significant increase in interest among national organizations
- Increased interest in MSOs and administrative consolidation

Collaboration and Strategic Restructuring by Field

2008 Data*



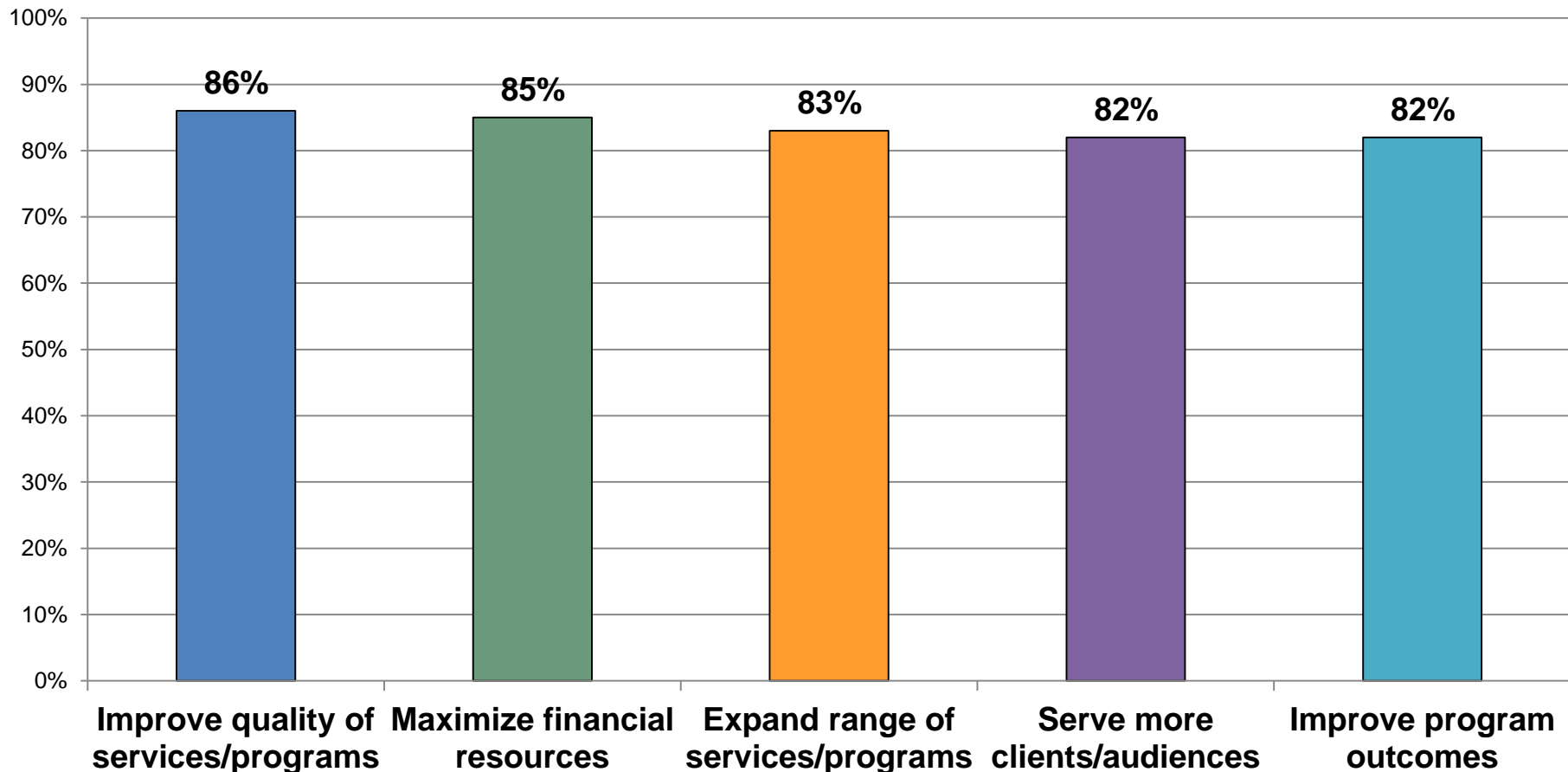
176 nonprofit collaborations, alliances and mergers

*2010 Collaboration Prize database, the Lodestar Foundation

Why Do Nonprofits Consider Collaboration?

2008 Data

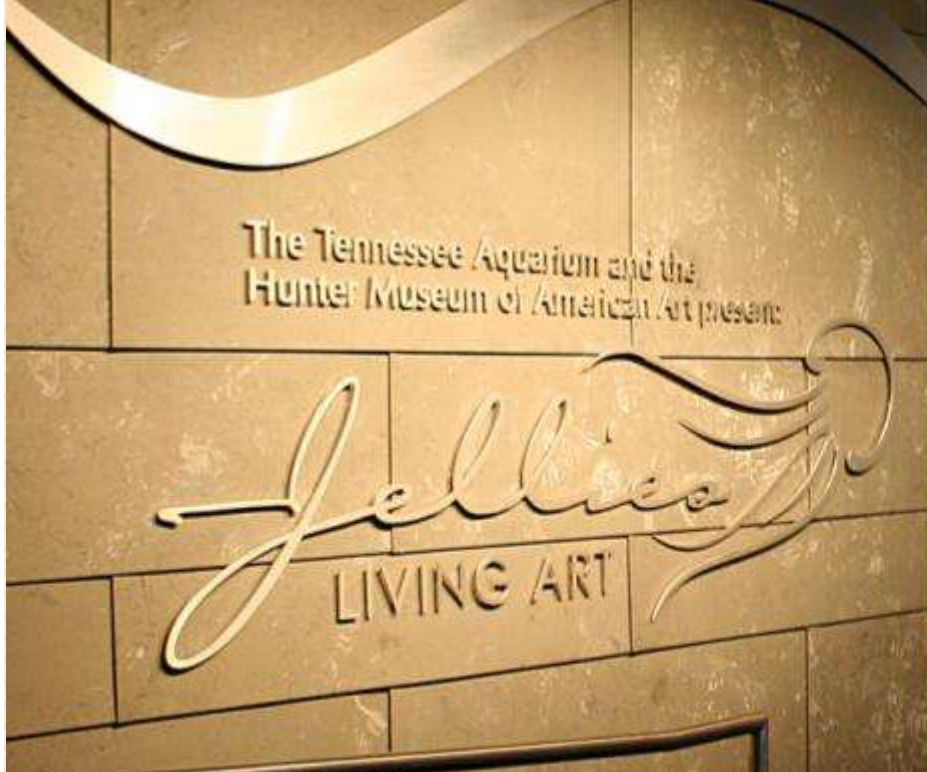
Factors that best describe why this collaboration was formed *



n = 644 *2010 Collaboration Prize database, the Lodestar Foundation

Case Studies





Administrative Consolidation

Chattanooga Museums

Tennessee Aquarium, Hunter Museum of American Art,
and the Creative Discovery Museum

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Case Study A



Case Study: Joint Programming

Ready Set Parent!

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Case Study B



Case Study: Merger

Crittenton Women's Union

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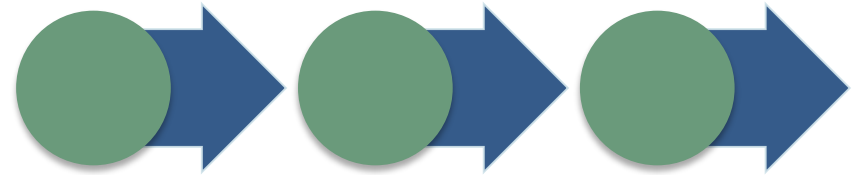
Case Study C

Roadblocks to Strategic Restructuring

- Autonomy concerns
- Lack of trust
- Self-interest
- Organizational culture

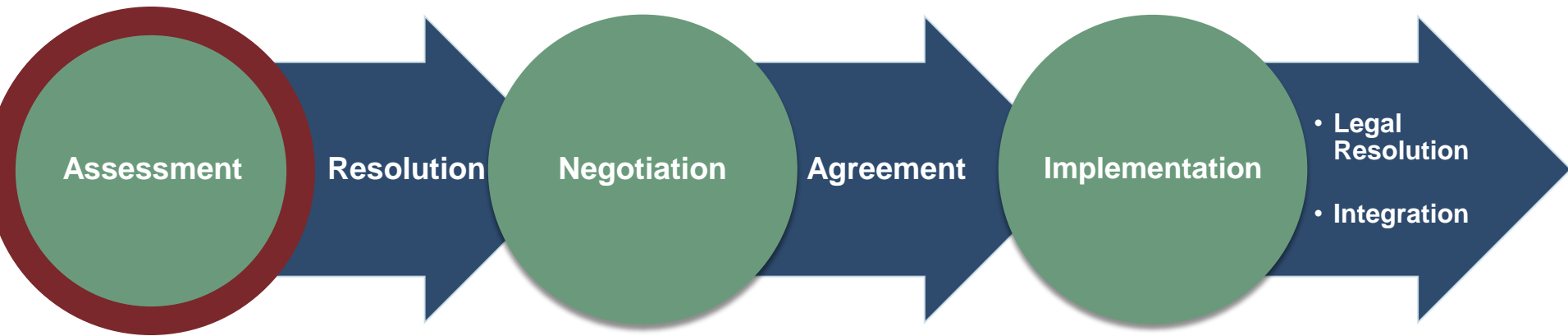
The Strategic Restructuring Process

- Assessment
- Negotiation
- Implementation



The Strategic Restructuring Process

Assessment



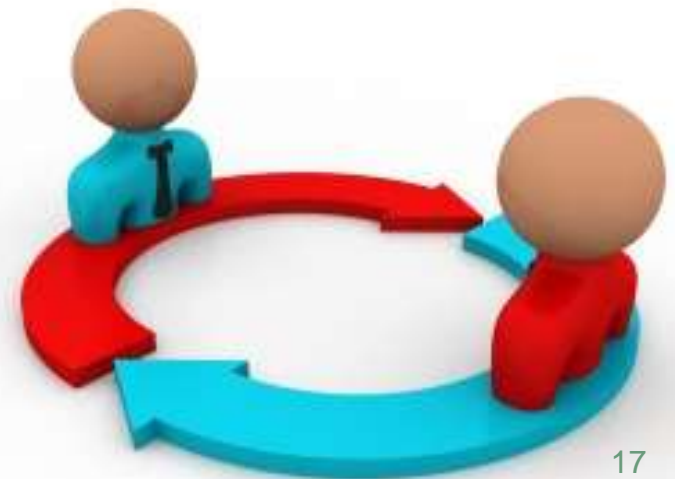
Self-Assessment

- Motivators
- Desired outcomes
- Critical issues
- Organizational factors or “red flags”
- Financial assessment



Partner Assessment

- Level of trust
- Past experiences
- “Usable” skills and assets
- Cautions and challenges
- Mission and program compatibility and complementarities
- Financial condition



Identifying Organizational Matches

- Organizations with similarities and differences in...
 - Mission and vision
 - Constituents served
 - Types of programs
 - Funding sources
 - Strengths and weaknesses

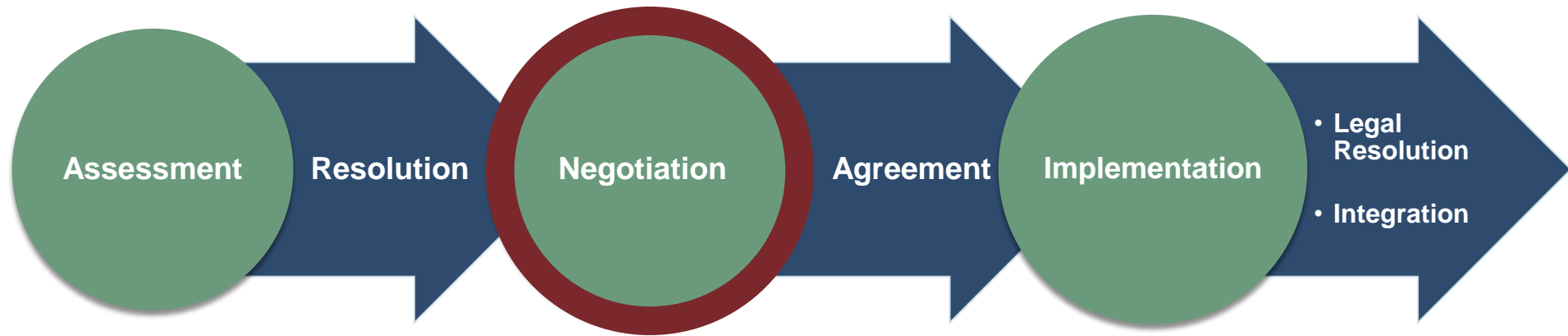


Joining Forces for Greater Impact

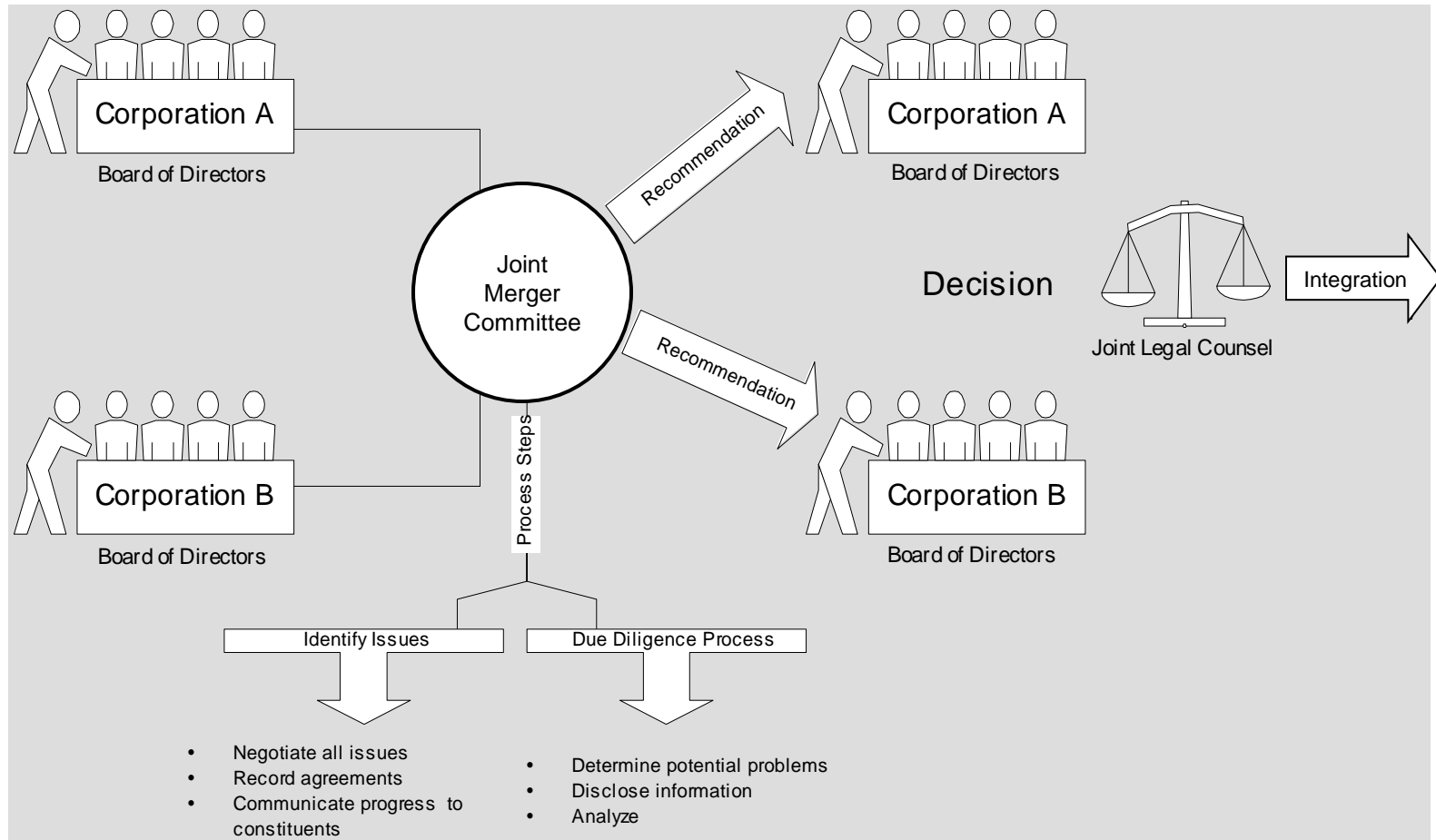
- Which organizations can help you fill your major gaps...
 - Provide skills and expertise to increase your operating capacity
 - Provide complementary services needed by your clients
 - Make you more efficient
 - Allow you to seize on major opportunities
 - Give you access to additional resources

The Strategic Restructuring Process

Negotiation

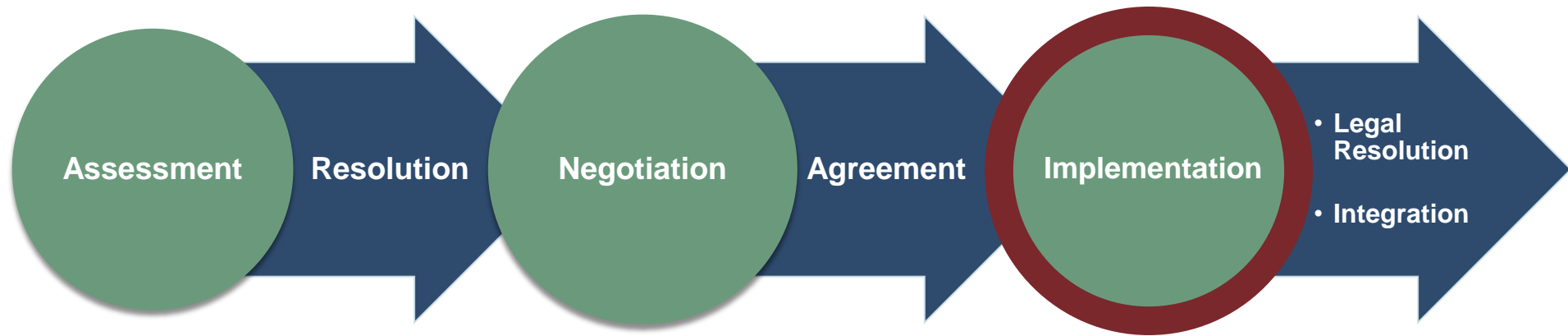


The Negotiations Process



The Strategic Restructuring Process

Implementation



Key Success Factors

Trust

Joint Decision-Making

Shared Culture

Board Engagement

Good Facilitation and Process

Sustainable Structure

Resources



Foundation Center
Collaboration Prize Database

<http://collaboration.foundationcenter.org>

La Piana Consulting
Strategic Restructuring

<http://www.lapiana.org/strategic-restructuring>



Thank You!

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