



**DATE:** April 27, 2021 | **TIME:** 9:00 – 10:30 a.m.

## MERGING FOR GOOD:

Thinking About Non-  
Profit  
Amalgamations  
Presentation

HEALTHY AGING

**CORE**

Collaborative Online  
Resources & Education

ALBERTA

## WELCOME!

**We invite you to write in the chat box and let us  
know your...**

**NAME**

**LOCATION**

**ORGANIZATION**

**We will start shortly**



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GOOD:**  
Thinking About Non-  
Profit  
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Presentation

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ALBERTA

**DATE:** April 22, 2021 | **TIME:** 9:00 – 10:30 a.m.

**HOST :** Cindy Nguyen, United Way of Calgary & Area

**GUEST SPEAKERS:**

*Trellis*

- **Angela Clarke**, Chief Strategy Officer

*Institute for Community Prosperity at Mount Royal University*

- **James Stauch**, Director
- **Cordelia Snowdon**, Projects Assistant

*Edmonton Seniors Coordinating Council*

- **Sheila Hallett**, Executive Director

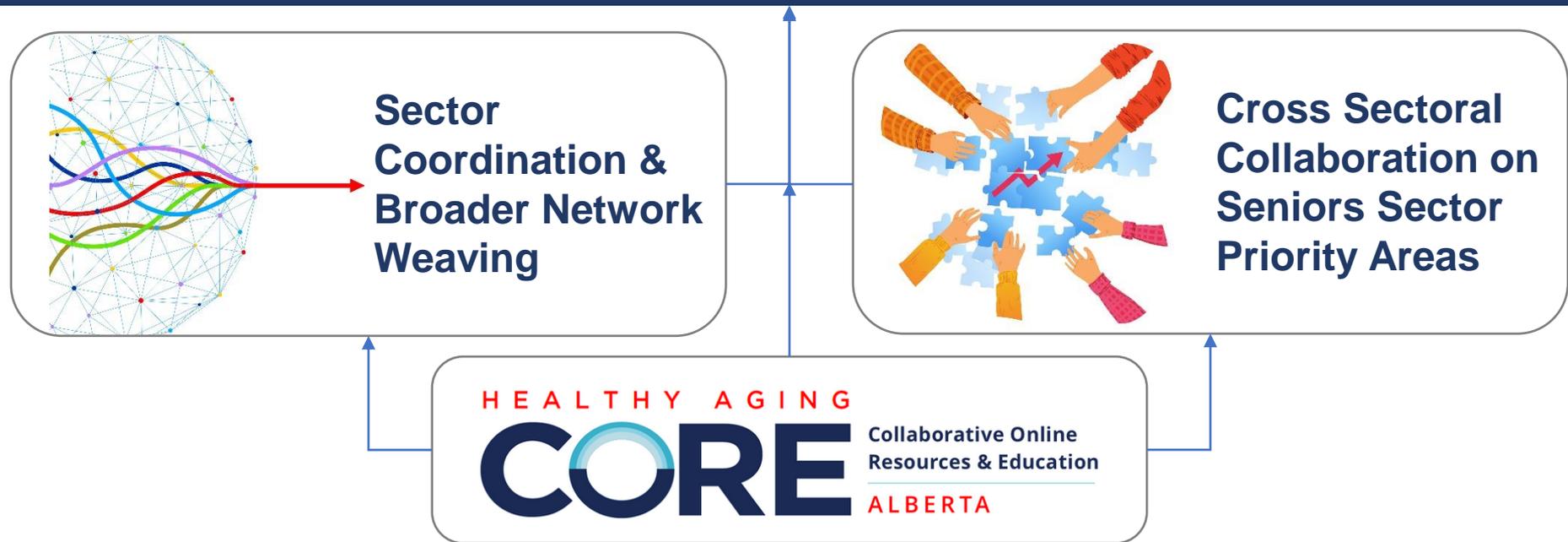


# AGENDA

- CBSS/CORE
- Sharing the Merger Experience
- Presentation on Case-Based Framework for Non-Profit Amalgamations
- Break
- Q & A – Panelists
- Wrap-Up & Goodbye



# COMMUNITY-BASED SENIORS SERVING (CBSS) SECTOR DEVELOPMENT INITIATIVE



# SECTOR CHALLENGE

CBSS and government partners jointly identified lack of coordinated sector as a challenge:

- Larger systems unable to collaborate and coalesce at a systems level
- Lack of unified sector voice meant limited influence around policy

Creating a coordinated  
**COMMUNITY-BASED  
SENIORS SERVING SECTOR  
IN ALBERTA**



*A joint initiative by:*





**MERGING FOR GOOD:  
CASE-BASED  
FRAMEWORK FOR  
NON-PROFIT  
AMALGAMATIONS**

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**Angela Clarke  
James Stauch  
Cordelia Snowden**

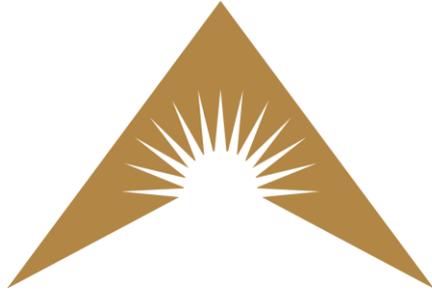
# MERGING For Good

A Case-Based Framework for Supporting  
Effective Nonprofit Amalgamations



Institute for Community  
Prosperity

Merging for Good was made possible  
through



VIEWPOINT

The dream of Trellis was made possible with the investment  
of



Charitable Foundation  
of the Family



United Way  
Calgary and Area



ABOVE+  
BEYOND  
Bringing out the best in people

evans HUNT



Byler Family Foundation

The Read Family Foundation

Trellis Foundation for Community Impact

Beddoe Family

Kanovsky Family Foundation

# The Climb to Trellis



INTEGRATING

## 2021 AND BEYOND

- Operational integration complete (e.g. payroll, communications, space)

## FALL, 2020

- Operational integration continues (e.g. financial systems, software)
- New name and brand unveiled
- 3 organizations, 3 identities

## SUMMER, 2020

- Operational integration commences (e.g. front-line programs)
- Report released: One Big Experiment: Chronicling a Nonprofit Merger in Action

## SPRING, 2020

- Staff and stakeholders briefed
- Public announcement
- Legal integration commences
- Transition Management Office set up to run May to October

## WINTER, 2019

- Scenario planning and assessment
- Feasibility affirmed
- Funders briefed/consulted

## FALL, 2019

- Scoping /consideration phase
- Initial overtures
- Board and senior management committees
- Consultants engaged

CONSIDERING

PLANNING



ALL SUCCESSFUL  
MERGERS  
RESULT IN **NEW**  
ORGANIZATIONS

1

# ONE BIG EXPERIMENT

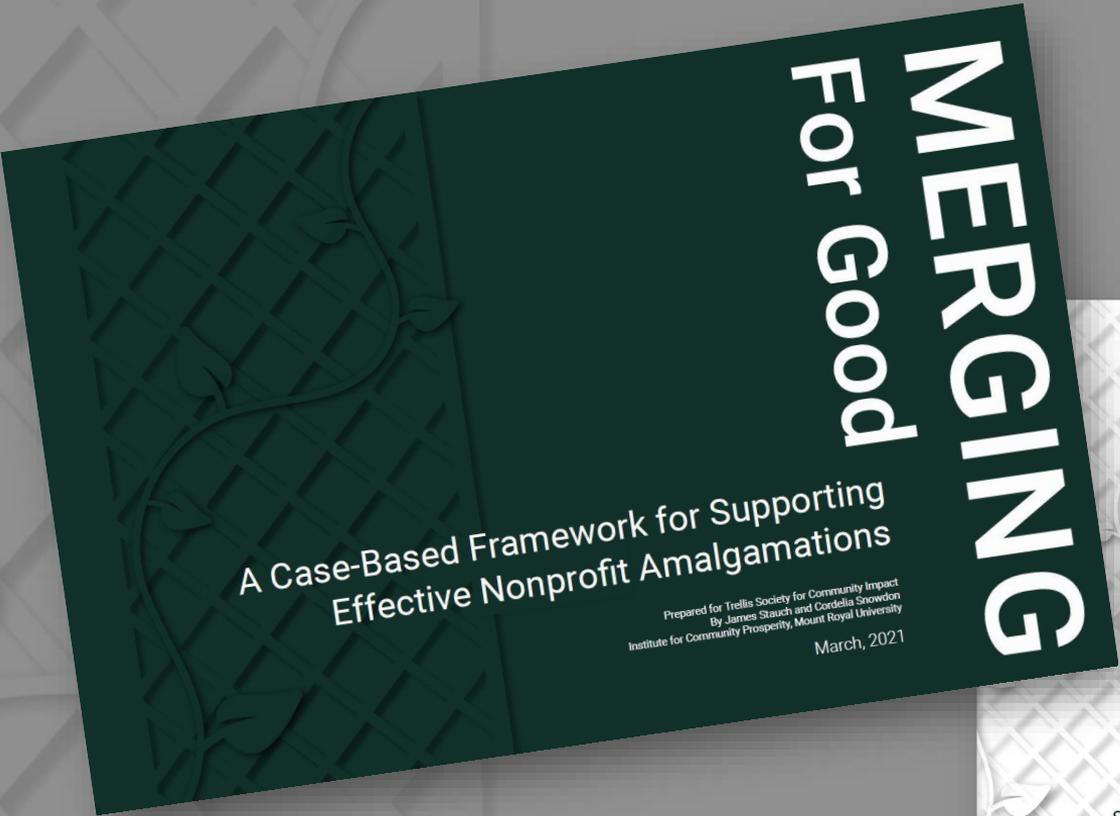
Chronicing a Nonprofit Merger in Action

Prepared for  
Boys & Girls Clubs of Calgary and  
Aspen Family & Community Network

by James Stauch and  
Cordelia Snowdon  
Institute for Community Prosperity  
Mount Royal University

Interim Report August 2020

2



# MERGING For Good

A Case-Based Framework for  
Supporting Effective Nonprofit  
Amalgamations

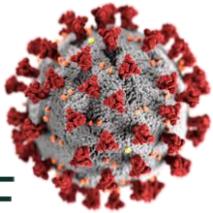
Prepared for Trellis Society for Community Impact  
By James Stauch and Cordelia Snowdon  
Institute for Community Prosperity, Mount Royal University

March, 2021



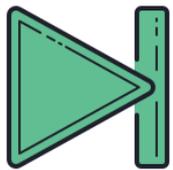
Nonprofit Amalgamations:

# Promise or Peril?



THE PANDEMIC AND THE  
PRESSURE TO AMALGAMATE

MERGER,  
AMALGAMATION OR  
ACQUISITION?



ENDS vs.  
MEANS

# METHODOLOGY

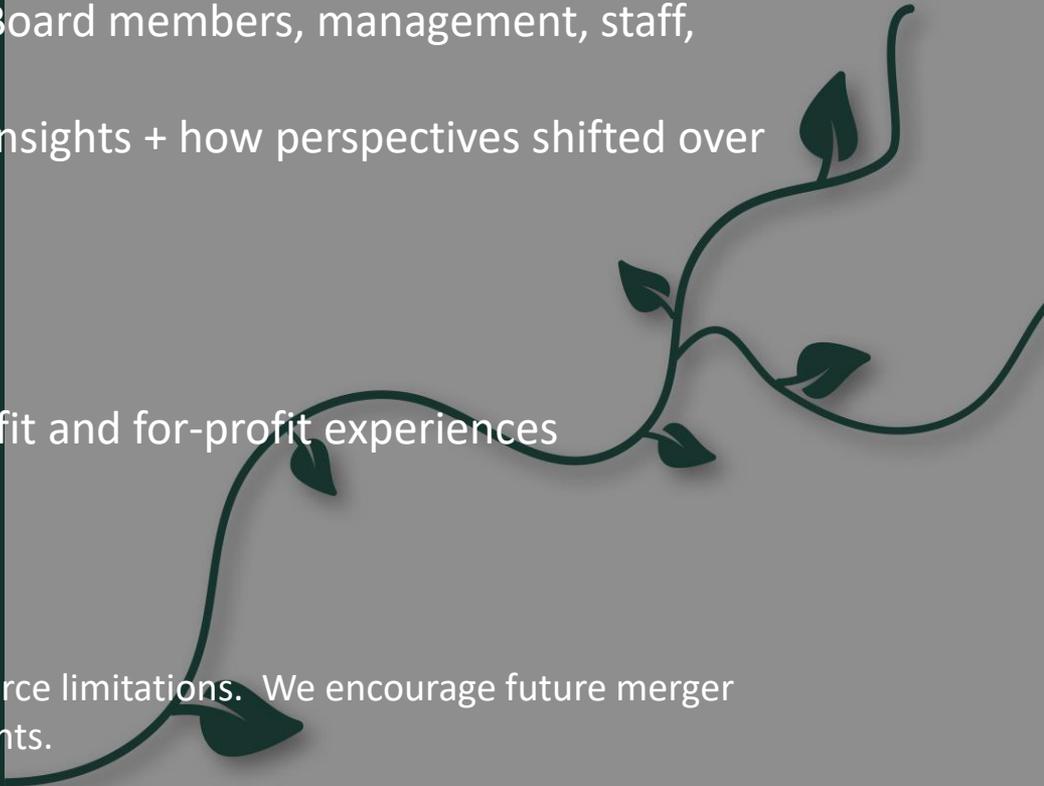
## 2 Rounds of Stakeholder Conversations\*

- 43 Conversations with 34 Individuals: Board members, management, staff, donors/funders, consultants
- Focused on capturing in-the-moment insights + how perspectives shifted over time

## Review of Literature, including:

- Academic and non-academic sources
- Human service organizations, non-profit and for-profit experiences
- Written, audio, and visual resources

\*Clients were not included due to time and resource limitations. We encourage future merger evaluations to incorporate the perspective of clients.

A decorative graphic of a dark green vine with several leaves, curving upwards from the bottom left towards the top right, set against a light grey background.

# The Framework



**CONSIDERING**  
the amalgamation



**PLANNING**  
the amalgamation



**INTEGRATING**  
the legacy  
organizations into  
the new organization

## AMALGAMATION CONSIDERATIONS AND PHASES

Consideration	Phase		
	 <i>Considering</i>	 <i>Planning</i>	 <i>Integrating</i>
 Values and Culture			
 Governance			
 Legal/Regulatory			
 Human Resources			
 Financial			
 Branding and External Communications			
 Funder and Donor Stewardship			
 Internal Communications			
 Programming/ Front-Line			
 Back-Office Operations			
 Space			
 Social Impact: Client Feedback, Data, R&D and Public Policy			
 Finding Closure: Celebrating and Grieving the Legacy			

# The Framework

## CONSIDERING an Amalgamation

FREE FROM  
COERCION?

NOT DRIVEN BY FINANCIAL  
PRESSURE?

IN THE COMMUNITY'S  
INTERESTS?

LEADERSHIP IS  
CLEAR?

SYMMETRY OF  
PURPOSE?

EXPERIENCE WITH  
COLLABORATION?

APPETITE FOR  
DISRUPTION?

LEARNING  
CULTURE?

SUPPORT FROM  
SUPPORTERS?

FINANCIAL  
CAPACITY?

# The Framework

PLANNING & INTEGRATING



VALUES AND CULTURE



GOVERNANCE



HUMAN RESOURCES



# The Framework

FINANCIAL CONSIDERATIONS

LEGAL AND REGULATORY CONSIDERATIONS

BRANDING AND COMMUNICATIONS



FUNDER AND DONOR  
STEWARDSHIP 

INTERNAL COMMUNICATIONS 

FRONT-LINE PROGRAMS 

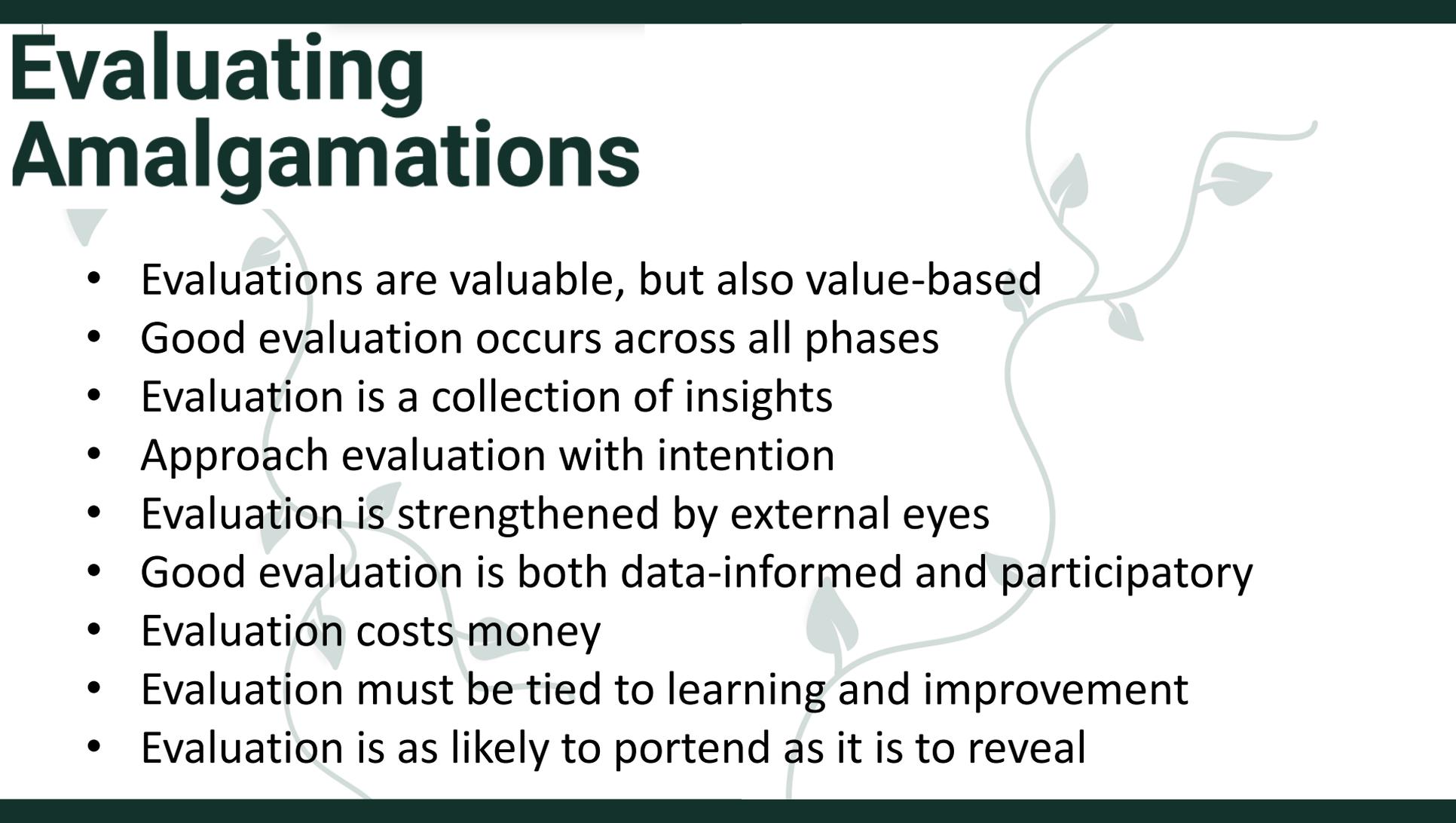
BACK OFFICE OPERATIONS 

SPACE 

SOCIAL IMPACT: CLIENT FEEDBACK,  
DATA, R&D AND PUBLIC POLICY 

FINDING CLOSURE:   
CELEBRATING AND GRIEVING THE  
LEGACY

# Evaluating Amalgamations

A decorative graphic of a light green vine with several leaves, winding across the right side of the slide. The vine starts near the top right and curves downwards and then back up towards the center.

- Evaluations are valuable, but also value-based
- Good evaluation occurs across all phases
- Evaluation is a collection of insights
- Approach evaluation with intention
- Evaluation is strengthened by external eyes
- Good evaluation is both data-informed and participatory
- Evaluation costs money
- Evaluation must be tied to learning and improvement
- Evaluation is as likely to portend as it is to reveal

# For Funders:

## A Guide to Supporting Mergers

- Signal, but don't drive
- Expect low frequency but high cost
- Consider step-wise funding
- Be more than transactional
- Don't scale down post-merger support
- Be flexible with reporting requirements
- Don't ask for metrics of merger success
- Don't nickel and dime
- Leverage your own investment
- Cover amalgamation evaluation costs
- Encourage organizational learning
- Be patient
- Build collective knowledge

# Where Next?:

## Your Amalgamation Learning Journey

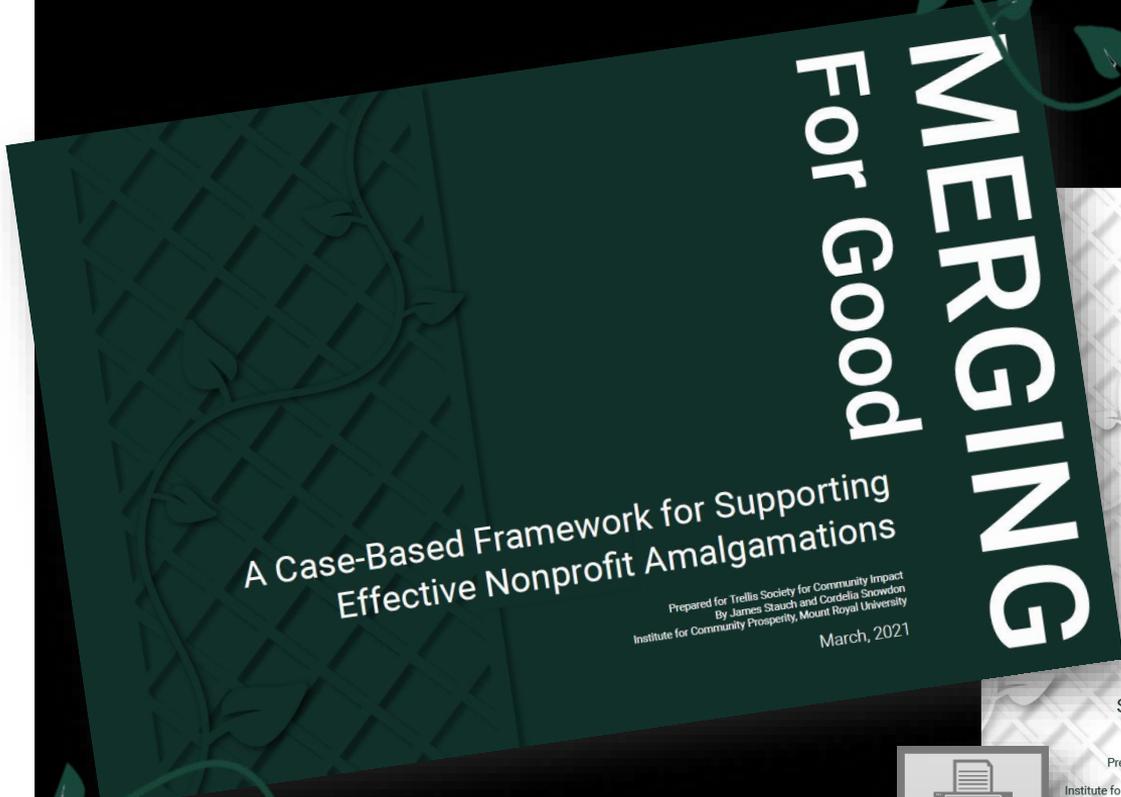
- Consider carefully, and let your team in on it
- Embark on a learning journey together
- Appendix C – resources, guides, webinars, and training
- Be clear on (and grounded in) what you value, and how you work
- Scan, and understand, your context

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Amalgamations

Prepared for Trellis Society for Community Impact  
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Institute for Community Prosperity, Mount Royal University

March, 2021



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March, 2021

DOWNLOAD:

[mtroyal.ca/communityprosperity](http://mtroyal.ca/communityprosperity) (under PUBLICATIONS tab)



MOUNT ROYAL  
UNIVERSITY  
1910

Institute for  
Community Prosperity



**James Stauch**

Director  
[jstauch@mtroyal.ca](mailto:jstauch@mtroyal.ca)

**Cordelia  
Snowdon**

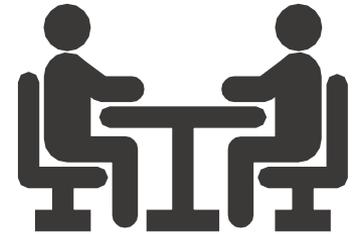
Projects Assistant  
[csnow073@mtroyal.ca](mailto:csnow073@mtroyal.ca)

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# Break 10 min

- Polls
  1. Your region
  2. Your organization type





# Q & A

Panelists

20 min

## *Trellis*

- **Angela Clarke**, Chief Strategy Officer  
*Institute for Community Prosperity at Mount Royal University*
- **James Stauch**, Director
- **Cordelia Snowdon**, Projects Assistant

# QUESTIONS?

Thank you for participating & sharing.

## SEE YOU ON CORE!

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*Remember to update your info on 211*

[healthyaging@calgaryunitedway.org](mailto:healthyaging@calgaryunitedway.org)

