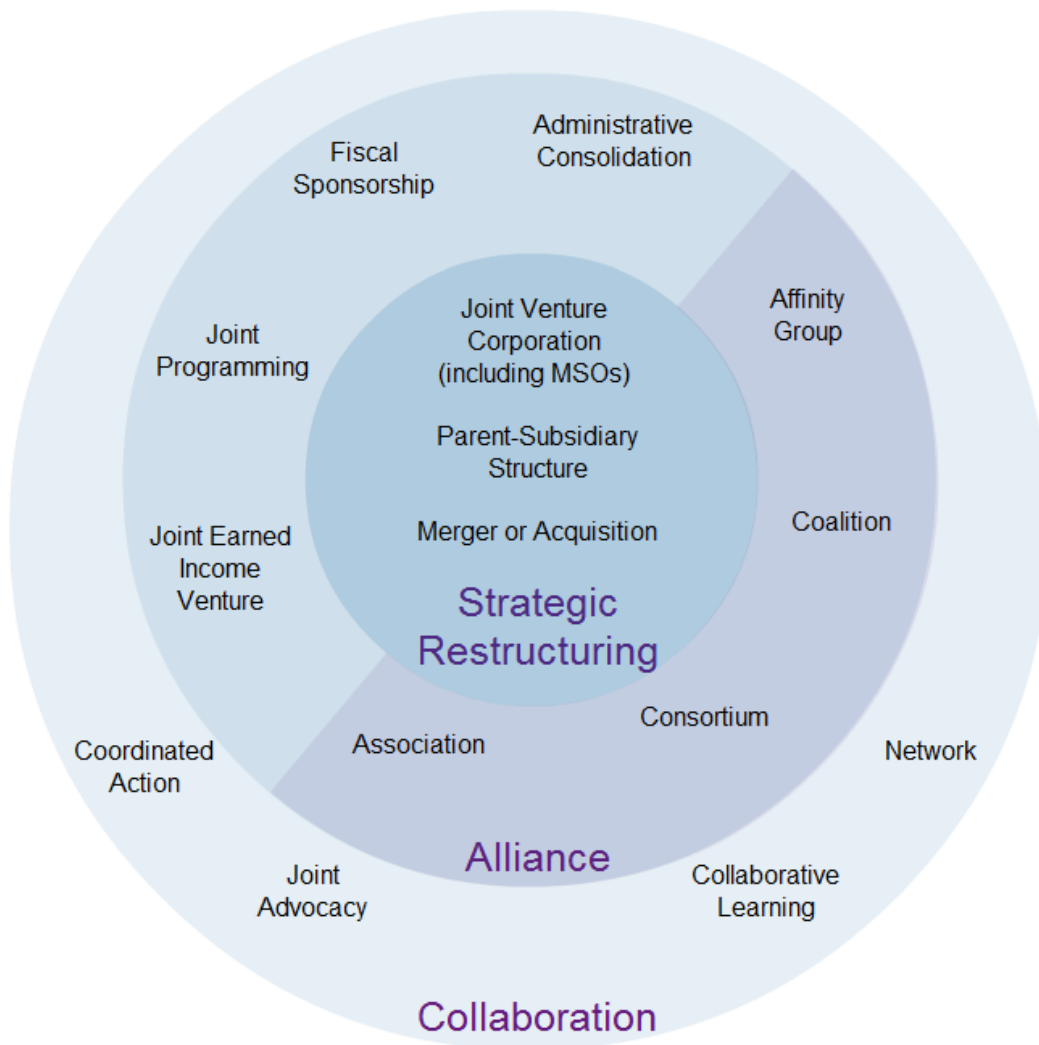


# The Collaborative Map

The Collaborative Map presents the range of ways that independent organizations can come together in pursuit of a shared goal.



## Collaboration

There are many ways to collaborate, and collaborations aren't mutually exclusive. Organizations can and do collaborate with multiple organizations, often from multiple sectors, on a range of initiatives. In fact, today more than ever organizations *must* collaborate, both broadly and deeply, because that is what it will take to address the complex challenges we face.

At the most basic level, two or more entities may choose to simply coordinate their actions, activities, advocacy, or learning; such options are shown in the outermost circle of the Map. You don't need a formal agreement to do these things, or a long-term commitment, although you might choose to make your participation official in some way. For example:

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- **Coordinated Action.** Two or more organizations might coordinate their planning or service provision, co-sponsor an event, pool resources to purchase an asset both could use, or solicit better pricing on assets they will purchase and use independently.

*This year the Nonprofit Quarterly (NPQ) launched a partnership with the Young Nonprofit Professionals Network (YNPN) to ensure that NPQ is serving and including YNPN membership in its information and readership community. It kicked off the collaboration by asking YNPN members to fill out a special survey; NPQ evaluated the results and wrote up a comparison of the YNPN member response to NPQ's broader 2014 reader survey, raising the visibility of issues affecting next generation leaders. (<https://nonprofitquarterly.org/policysocial-context/24612-ynpn-npq-begin-collaboration-young-nonprofit-leaders-speak-out.html>)*

- **Joint Advocacy.** Joint advocacy can be aimed at changing policies locally, regionally, or nationally.

*A notable recent example is the pursuit of marriage equality. Over the course of the last decade dozens of nonprofits joined a growing number of individual voices to call for change with respect to the legality of gay marriage, many coordinating their efforts in particular states. ([http://www.theatlantic.com/politics/archive/2012/12/the-marriage-plot-inside-this-years-epic-campaign-for-gay-equality/265865/?single\\_page=true](http://www.theatlantic.com/politics/archive/2012/12/the-marriage-plot-inside-this-years-epic-campaign-for-gay-equality/265865/?single_page=true))*

- **Collaborative Learning.** Collaborative and cross-organizational learning can happen in community convenings, through the coordination and sharing of training opportunities, or through learning communities. Learning communities in particular can provide a mechanism for individuals to deepen their understanding of a given topic or issue area by learning together, putting that learning into action, and then deepening the learning by jointly reflecting on those actions. A common practice in education, learning communities are often intentionally designed and convened by funders interested in supporting both leadership development and field building in a range of content areas.

*Hawai'i Community Foundation's \$5 million Schools of the Future capacity building Initiative (2009-2013) provided funding for professional development, planning for school change, technology infrastructure upgrades, and—a major component—a learning community in which the 18 funded schools could share their experiences in trying out new instructional methods. (<http://www.geofunders.org/resource-library/all/record/a066000000AhjF4AAJ>)*

- **Network.** Networks are collections of individuals and organizations—often self-organizing—working together to create social change. Some networks do ask members to make a formal commitment to participate or share data; many of the “collective action” examples that have been highlighted in recent literature do this.

*The Boston Green and Healthy Building Network was established to bring together two sets of organizations (public health and environmental groups) advocating for change in building codes in Boston. The Barr Foundation supported an effort to “map” the organizations’ networks and*

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*explore whether they could coordinate their efforts and develop a more unified message to local policymakers. The parties have since strengthened connections and coordination among public health and environmental organizations, improved access to influential policymakers, and achieved wins in health-related building policies. (<http://www.barrfoundation.org/news/boston-green-and-healthy-building-network>)*

## Alliance

When needing a more formal, structured partnership, you may want to consider some sort of alliance; such options are shown in the second of the three circles on the Map. La Piana Consulting considers these as falling into two categories: 1) those that involve doing some part of your nuts-and-bolts *business* together (such as programming, administration, or revenue generation), and 2) those that are really more about working together to have an impact on the field, for example through advancement of a social change agenda or work to strengthen organizations with a particular issue or geographic focus.

The first category (medium-blue in the Map) includes administrative consolidation, fiscal sponsorship, joint programming, and joint earned income ventures. The second category (light purple in the Map) includes affinity groups, associations, consortiums, and coalitions. In either case decision-making power is shared or transferred, but the organizations involved are not called upon to make changes to their corporate structure.

Let's look more closely at the various types.

- **Administrative Consolidation.** An administrative consolidation is an alliance that entails the sharing, exchanging, or contracting of administrative functions to increase the operational efficiency of one or more of the partner organizations.

*Nine Habitat for Humanity affiliates in the Charlotte, North Carolina area came together to collaborate and consolidate business processes; they refer to their partnership as Habitat for Humanity Metrolina Partners. Current focus areas include joint purchasing, joint training, joint ReStore marketing, and mortgage servicing. (<http://www.bizjournals.com/charlotte/print-edition/2013/06/07/habitat-metrolina-partners-focuses-on.html?page=all>)*

- **Fiscal Sponsorship.** Fiscal sponsorship refers to the practice of a nonprofit organization offering its legal and tax-exempt status to unincorporated groups engaged in activities related to the organization's mission. It typically involves a fee-based contractual arrangement between the fiscal sponsor and the unincorporated group, or project. The fiscal sponsor often provides some amount of administrative support to the project.

*Citizen Engagement Laboratory "supports, starts, and connects individuals and organizations that use technology-fueled approaches to close the gap between the world we live in and the more*

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*just and equal world most of us want.” Though its Powerful Communities program CEL works with entities at all stages of development, providing a combination of infrastructure and strategic guidance. (<http://engagementlab.org/what-we-do/powerful-communities/>)*

- **Joint Programming.** A joint programming is an alliance in which organizations come together to launch and manage one or more programs to further the goals of the participating organizations.

*In Buffalo, New York, EPIC and Baker Victory Services joined forces to provide more robust hospital-based parent education programs to help new parents foster the social, emotional, and cognitive development of their children; the result is the Ready, Set, Parent! program, which dramatically increased the number of new parents served per year.*

*(<http://www.lapiana.org/insights-for-the-sector/insights/collaboration-and-strategic-restructuring/ready-set-parent.aspx>)*

- **Joint Earned Income Venture.** A joint earned income activity occurs when two or more organizations come together to launch or manage a revenue-generating activity that benefits all partners (e.g., a combined capital campaign or social entrepreneurial venture).

*Blind Industries & Services of Maryland chose to expand its manufacturing capacity not on its own, but through a partnership with RLCB, another organization that provides employment opportunities for blind individuals. (<http://www.bism.org/about>)*

- **Affinity Group.** Affinity groups bring together professionals in the nonprofit sector for networking, peer support, and professional growth. Often convened by associations or management support organizations, affinity groups may be organized by issue (funding efforts to end homelessness), identity (Native Americans in Philanthropy), role (CFOs, child care providers), function (volunteer management), stage in one’s career (young nonprofit professionals, seasoned CEOs), geographic focus, or some combination (the Nonprofit Human Resource Affinity Group of Central Florida). Affinity groups may be less formal, or may be formalized through the creation of a separate organization.

*This is what happened with GEO (Grantmakers for Effective Organizations), which started as a small gathering of philanthropic leaders and is now an independent corporation with 459 member organizations. (<http://www.geofunders.org/about>)*

- **Coalition, Consortium, and Association.** Coalitions, consortiums, and associations are groups of organizations, individuals, and/or government entities that choose to pool their resources and work toward achievement of a common goal. Coalitions typically share a specific political or social change goal, while consortiums and associations typically serve and represent the interests of those involved—though this distinction isn’t universal. Associations are more likely to hold their members to a common set of

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standards, but again, that distinction is not universal; many ask for little more than dues and an annual commitment to participate in advancing shared goals.

*Coalitions may be temporary or long-term, small and local or large and national. They may operate more or less informally, with or without the formation of a separate legal entity. The Pennsylvania Coalition Against Rape (PCAR) is an example of a coalition formed as an independent entity. It partners with a network of Pennsylvania rape crisis programs to eliminate all forms of sexual violence and to advocate for the rights and needs of victims of sexual assault. (<http://www.pcar.org/about-pcar>)*

*The Guilford Nonprofit Consortium is collaborative of nonprofit organizations in Guilford County, North Carolina that fosters mutual assistance and support within the nonprofit community to create a more efficient and effective nonprofit sector. Benefits of membership include an Executive Director Academy, a financial management help desk, a Nonprofit Management Institute, a board development academy, job postings, and various opportunities for discussion and shared learning. (<https://www.quilfordnonprofits.org/>)*

*The California Alliance of Child and Family Services is a statewide association of more than 130 private nonprofit child and family serving agencies committed to providing the highest quality services in the most caring and effective fashion. The California Alliance provides legislative and regulatory advocacy on behalf of its member agencies regarding a wide range of key policy issues. All members are required to meet Alliance or national accreditation standards. New members are granted provisional status during their accreditation process. (<http://www.cacfs.org/?page=Membership>)*

Alliances can evolve over time. Some start less formally and over time move toward establishment of a formal, legal connection between organizations or even the formation of a new entity, such as those described below.

## Strategic Restructuring

Sometimes, the best option for two or more organizations seeking to come together in pursuit of a shared goal might be a structural change or the creation of a new entity. Such options are shown in the centermost circle on the Map. For example:

- **Joint Venture Corporations (including MSOs).** Joint venture corporations consolidate some portion of the administrative, programmatic, or advocacy functions of two or more organizations within a jointly controlled corporation. The partner organizations share governance of the new organization. Many joint venture corporations are established in order to further a specific programmatic or advocacy goal. A management service organization (MSO) is a specific type of new organization created to integrate administrative functions, and thus increase the operational efficiency of participating organizations.

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*The Children and Family Services Center is a single building in Charlotte, North Carolina where ten agencies offer comprehensive assistance to children and families. The CFSC, a separate 501(c)(3), is governed by a board made up of representatives from each of the participating agencies as well as at-large community leaders. (<http://childrenfamily.org/>)*

- **Parent-Subsidiary Structure.** A parent-subsidiary structure is an integration of some or all administrative functions and programmatic services of participating organizations, with the goal of increased administrative and programmatic efficiency and/or efficacy. Although the visibility and identity of the original organizations often remain intact in a parent-subsidiary relationship, some organizations involved in such restructurings consolidate to the point where they look and function much like a merged organization. Not everyone with this intent refers uses this language; some organizations prefer to use the term “affiliated entities.”

A parent-subsidiary structure is sometimes chosen due to the restrictions on transferability of contracts, licenses or certifications, restrictions which may be temporary in nature. The creation of a parent-subsidiary structure allows the organizations to achieve the benefits of a consolidated organization while maintaining distinct corporations.

*This was the goal for AARP and Experience Corps. In 2011, Experience Corps joined forces with AARP to become AARP Experience Corps, an award-winning national program that engages 50-plus adults as tutors and mentors for children in grades K-3. As an “affiliated entity” of AARP, AARP Experience Corps retained its own 501(c)(3) (allowing it to accept federal grants and conduct charitable fundraising), but program operations (e.g., staff) were transferred to AARP. This arrangement remained in place for over three years. As is often the case, however, the boards are now in the process of dissolving the Experience Corps 501(c)(3), after which Experience Corps will become a program of the AARP Foundation.*

<http://www.lapiana.org/stories-our-clients/nonprofit-stories/aarp-experience-corps.aspx>

- **Merger or Acquisition.** A merger or acquisition is an integration that includes the integration of all programmatic and administrative functions to increase the administrative efficiency and programmatic impact of one or more organizations. Note: FASB (Financial Accounting Standards Board) requires an “accounting” determination of either a merger or acquisition, as described below.

A **merger** occurs when *two or more organizations are dissolved* into a newly created corporation that includes some or all of the resources, administrative infrastructure, and programs of the original organizations.

An **acquisition** occurs when *one corporation is dissolved* (acquired corporation) with all activities and resources transferred into the surviving (acquirer) corporation. (The selection of an acquisition form of consolidation does not limit the identity/branding,

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governance, or leadership options of the participating organizations. However the selection of an acquisition form of consolidation does impact the booking of assets within the surviving corporation as outlined by FASB Statement No. 164.) An acquisition may also involve formation of a new entity where one participating entity has obtained control of the nonprofit activities or businesses of all participating entities (e.g., by appointing significantly more of the governing board of the newly formed entity, retaining its bylaws and policies, etc.).

*In 2012 Family and Youth Services (FAYS) merged with the Women's Center of San Joaquin County to become Women's Center – Youth & Family Services (Women's Center-YFS). Women's Center-YFS is San Joaquin County's only provider of shelter and services specifically designed to meet the needs of homeless and runaway youth and victims of domestic violence and sexual assault. (<http://www.womenscenteryfs.org/index.php/about-us/history>)*

## Start with the End in Mind

There are many different terms used to describe partnerships between and among nonprofits, and between nonprofits and for-profits, government entities, and unincorporated groups. The terms shown on the Collaborative Map are among the most common, but not everyone uses these (or other) terms in exactly the same way. This is natural, and—far from being problematic—simply serves to highlight that what is most important when considering a partnership is to be clear on what you want to achieve. There *will* be a way to make that happen, whether you are two organizations or 22, looking to partner in one area or all.