

# STRATEGIC ALLIANCES:

## A primer for nonprofit agencies

United Way, Associated Grantmakers of Massachusetts, The Boston Foundation, Third Sector New England, and Massachusetts Nonprofit Network will host a symposium bringing together an array of experts and nonprofit agencies to discuss and explore the continuum of partnerships from strategic alliances to mergers. As part of the program, agencies will be linked to information, tools, and take-away resources to help them self-assess, explore, and implement appropriate strategies.

### AGENDA FOR THE DAY

Light breakfast/Registration	9:30am
Welcome from UMASS Boston and partners	10:00am
Opening Panel Discussion: Mergers	10:30am
Keynote address	11:30am
Lunch begins (lunch provided)	11:45pm
Second Panel Discussion: Other Collaborations	12:00pm

Breakout Sessions	1:00pm – 2:30pm
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- How to Get the Board on Board: a Toolkit for Getting Started*

  - This session will focus on how nonprofit CEO/Executive Directors can educate their board leadership about options to increase operational efficiency while staying mission focused.
  - Specific topics covered: Strategic Communications, Board Experience
- Mind the Gap: Identifying and Resolving Operational Inefficiencies*

  - This session will provide strategies and tools for agencies interested in streamlining operations in an effort to reduce costs and/or increase productivity.
  - Specific topics covered: Strategic Consulting
- Tell it Like it Is: Don't be Afraid of the "M" Word*

  - For some agencies, a merger may make the most sense in order to ensure individuals in the community continue to receive important services. This session will explore when mergers make the most sense and how to communicate the decision to internal and external stakeholders.
  - Specific topics covered: Financial, Legal, Strategic Communications
- Talent Management: Keeping Up Morale When Times are Tough*

  - In uncertain times, staff members often face high levels of stress. This session will provide techniques and examples of how to create a transparent work environment with open lines of communication between management, board, and employees.
  - Specific topics covered: Human Resources
- PR Nuts and Bolts for Weathering the Storm: Tools for Effective Communication*

  - Now more than ever, it is critical for nonprofit organizations to communicate their vision, impact in the community, and state of the challenges ahead. This session will give specific strategies for messaging, harnessing "earned" public relations, and positioning your work for maximum impact.
  - Specific topics covered: Strategic Communications
- The Dating Game: How to Find Nonprofits that Share Your Interest in Collaboration*

  - For agencies interested in collaborations, sometimes the biggest obstacle is identifying willing partners. This session will provide tips for how to seek out like-minded organizations, how to begin the conversation, and how to find common ground which results in improved efficiency for all collaborators.
  - Specific topics covered: Strategic Consulting, Nonprofit Landscape Knowledge

7. *Let's Just Be Friends: Exploring Collaboration Models Without Merging*

- There is a full spectrum of options for collaborations that don't involve merging organizations including sharing physical space, outsourcing and combining operational tasks, collaborative fundraising, and many other models. This session will build off the morning panel and provide more detail on what's involved in these collaborative arrangements.
- Specific topics covered: Strategic Consulting, Direct Nonprofit or Board Experience

Networking and Resource Fair	2:30 – 4:00pm
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Attendees will participate in a structured networking exercise to meet other nonprofits in their geographic area and with similar missions. Attendees may also visit the Resource Fair table to pick up information on vendors and services targeted to mergers, collaborations, and operational efficiencies.