



Consultant Convening: The Power of Partnership in Uncertain Times

*In Partnership with
Hartford Foundation for
Public Giving*

We help leaders make better decisions. / fiopartners.com

Welcome



Our Objective

To create an interactive, engaging experience for consultants to **build relationships**, to continue to acknowledge the **shifting context for our work** and its impact on our clients, and to explore our collective role in **supporting partnerships in the nonprofit sector in our region**

Our Agenda

Building Connections

Update: Exploring Context for Our Work

The Power of Partnership
in Uncertain Times

Closing Reflection

Our
Agreements
for Our Time
Together

From last time....

Hold an abundance mindset.

Authenticity.

Curiosity.

Respect.

Joy.

Using “I” statements.

Start with your headline.

Stories stay, lessons leave.

Connecting With Each Other







What was your first job and what did you learn?

How do you enjoy spending time outside of work?

What is your favorite type of cuisine? And why?

What is your favorite place in the world and why?

**What is something that has happened recently that
you are proud of?**

What is your all-time favorite holiday season dish?

Update: Context for Our Work

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Update:
Context for
Our Work

Acknowledging Current Moment: What are seeing as **issues organizations are reacting to now?** What is different from when we met in May?

How Are You Shifting: How are you **shifting or adjusting your own services?** And approaches?

What's Next: What are your clients **preparing for or looking towards** on the horizon?

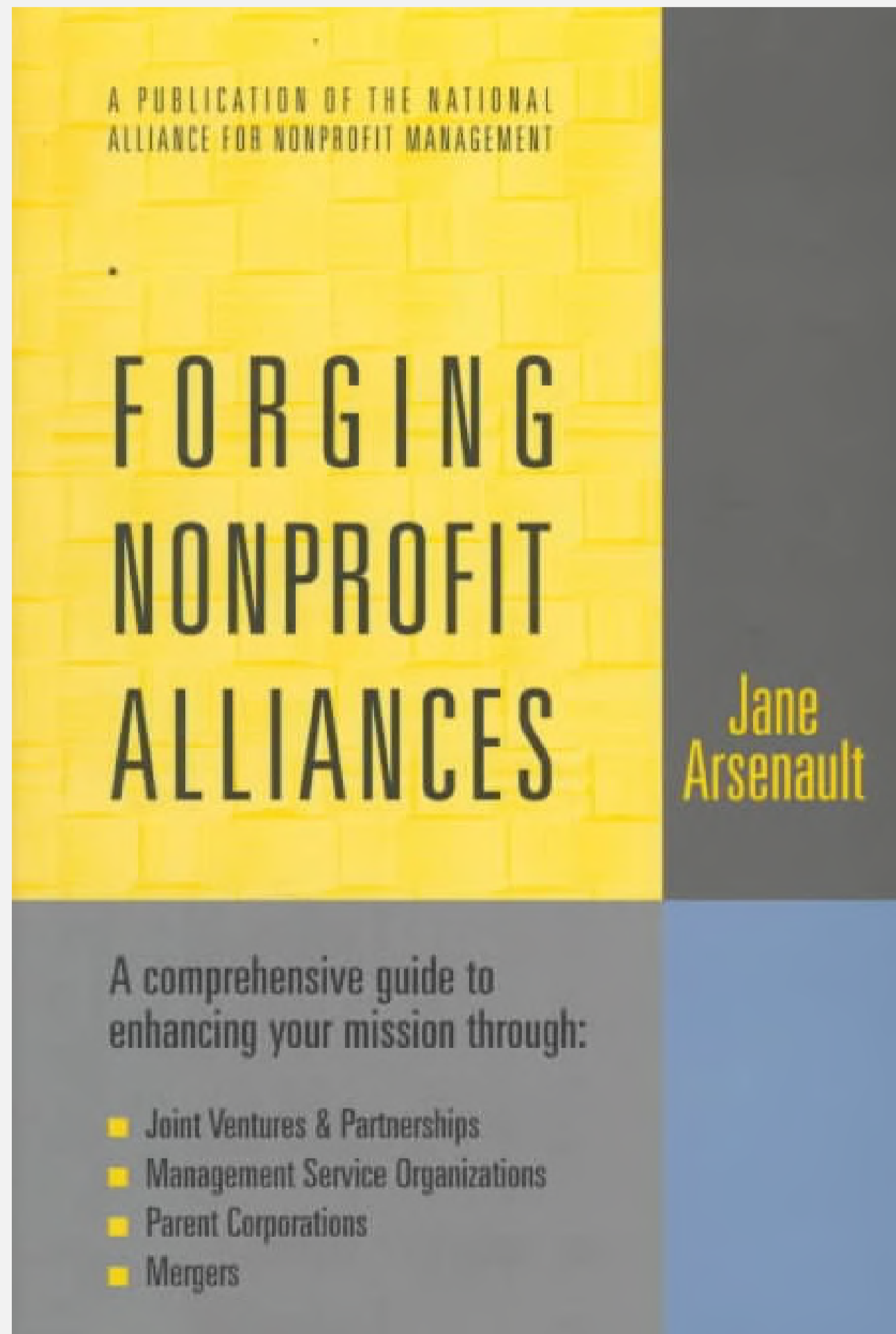
The Power of Partnership in Uncertain Times

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Why talk about
partnership now?
What are we all seeing?

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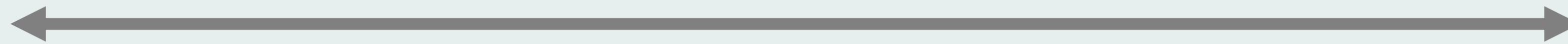
Our Grounding In This Work: Forging Nonprofit Alliances



Fio Partners has supported the creation of strategic alliances ranging from coordination to collaboration to consolidation:

- Community impact coalitions
- Formal program collaborations
- Joint ventures or partnerships
- Management service organizations (MSOs) for cost savings and sharing back-office functions
- Service networks that share state contracts
- Parent corporations linking individual nonprofits capable of pursuing market opportunities jointly
- Mergers or acquisitions

Strategic Alliance Continuum



Coordination

- Involves communication and some sharing of information
- Decision-making is independent. Low risk and low or no investment of resources

Collaboration

- Organizations work together to accomplish a common goal
- Increasing degrees of coordination, investment, and risk

Consolidation

- Involves alterations to the legal links between organizations
- Increasing central authority and reduction in autonomy

Developing Nonprofit Partnerships

Preparing to Partner

Selecting A Partner

Negotiating A
Partnership Model

Agreements to
Support Partnership
Enactment and
Implementation

Post-Enactment
Integration and
Implementation



Make the
conversation
about your
client's
why.

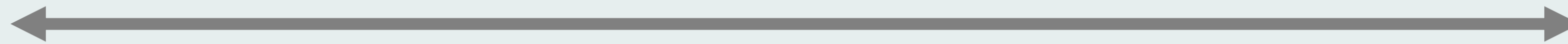
**Taking stock
of your client's
current situation
and clarifying
the why requires
understanding:**

- Financial Health
- Program Viability
- External Environment
- Strength of Relationships
- Potential Options
- Mindset of Leaders Involved

What is the vision for the shared work?

- What type of work do you want to do together?
- What are your shared values about that work?
- To what degree do the organizations need to control the activities to achieve the strategic alliance's objectives?
- What structure will promote the successful execution of the shared work?

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Sharing Experiences & Observations



- What are **challenges with partnership** that you've observed? What are strategies that you would suggest or have observed to address those challenges?
- What are **examples of formal partnerships that you've seen/supported that were successful?** What made them successful?

Supporting Clients in Financial Distress



- **Recognizing the Situation:**
 - How have you approached working with organizations who are in financial distress?
 - What information is most useful?
 - What strategies are helpful in having difficult conversations? With staff? With Boards?
- **Partnership Options in Crisis:** What partnership strategies have you seen be successful in addressing a financial crisis?
- **Supporting Decision-Making:** What strategies have you seen be successful when you are supporting decision-making at times of crisis?

What Works:
Tips for Success
*Guidance from Pro Bono
Partnership*

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P A R T N E R S H I P

Volunteer Lawyers Strengthening Nonprofits & Our Communities

The Power of Partnership in Uncertain Times

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Sara Taylor, Senior Staff Attorney

November 21, 2025

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Key Success Factors for Creating Nonprofit Partnerships



Process Success Suggestions for Consultants

- Start with the threshold questions “Why are we here? What do these nonprofits hope to achieve through a potential collaboration? What are the goals?”
- Ensure the right people from the nonprofit are at the negotiating table
 - Board leadership should be driving the deal w/consultant navigating
- Fully examine “fit” and mission alignment between the nonprofits involved
- Have a shared vocabulary with the nonprofit’s leaders about options:
 - Collaboration Agreement vs. Merger
 - Merger vs. Asset Transfer followed by Dissolution
 - Asset Transfer to a single nonprofit followed by Dissolution; vs. Dissolution w/ assets going to a single nonprofit or to several nonprofits
- Engage with legal support after there has been a “meeting of the minds” on goals, business terms, and about how the parties want to proceed



Consultants' Technical Experience Will Be Helpful!

- Business Knowledge
 - Understanding the market
 - Identifying and dealing with potential hurdles
- Communication and Organizational Skills
 - Facilitating discussions and “ego checks” to keep deals on track
 - Developing a communication plan for member buy-in (if a member nonstock) and community support
 - Bringing parties together and help them get to a mutually agreeable place

When Pro Bono Partnership clients mention potential collaborations to us, we highly recommend engaging with nonprofit consultants and seeking funding to support those engagements.



Pro Bono Partnership Legal Support for Nonprofit Partnerships



Requesting Legal Assistance

- Information re: applying for existing nonprofits, which includes our current administrative fee structure:
<https://probonopartner.org/nonprofits-clients/request-legal-assistance/existing-nonprofits/>
- Documents that we require from applicants:
 - Certificate of incorporation
 - IRS tax determination letter
 - List of board members and officers
 - Bylaws
 - Last Form 990, 990-EZ, or 990-N filed
 - Form 1023 or Form 1023-EZ
 - Budget



Getting in Touch



Contact Us

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How Can You Help: Contributing to the Partnership Journey

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What Are Skills We Each Bring to Steps in The Process

Preparing to Partner

Selecting A Partner

Negotiating A
Partnership Model

Agreements to
Support Partnership
Enactment and
Implementation

Post-Enactment
Integration and
Implementation

Closing Reflection

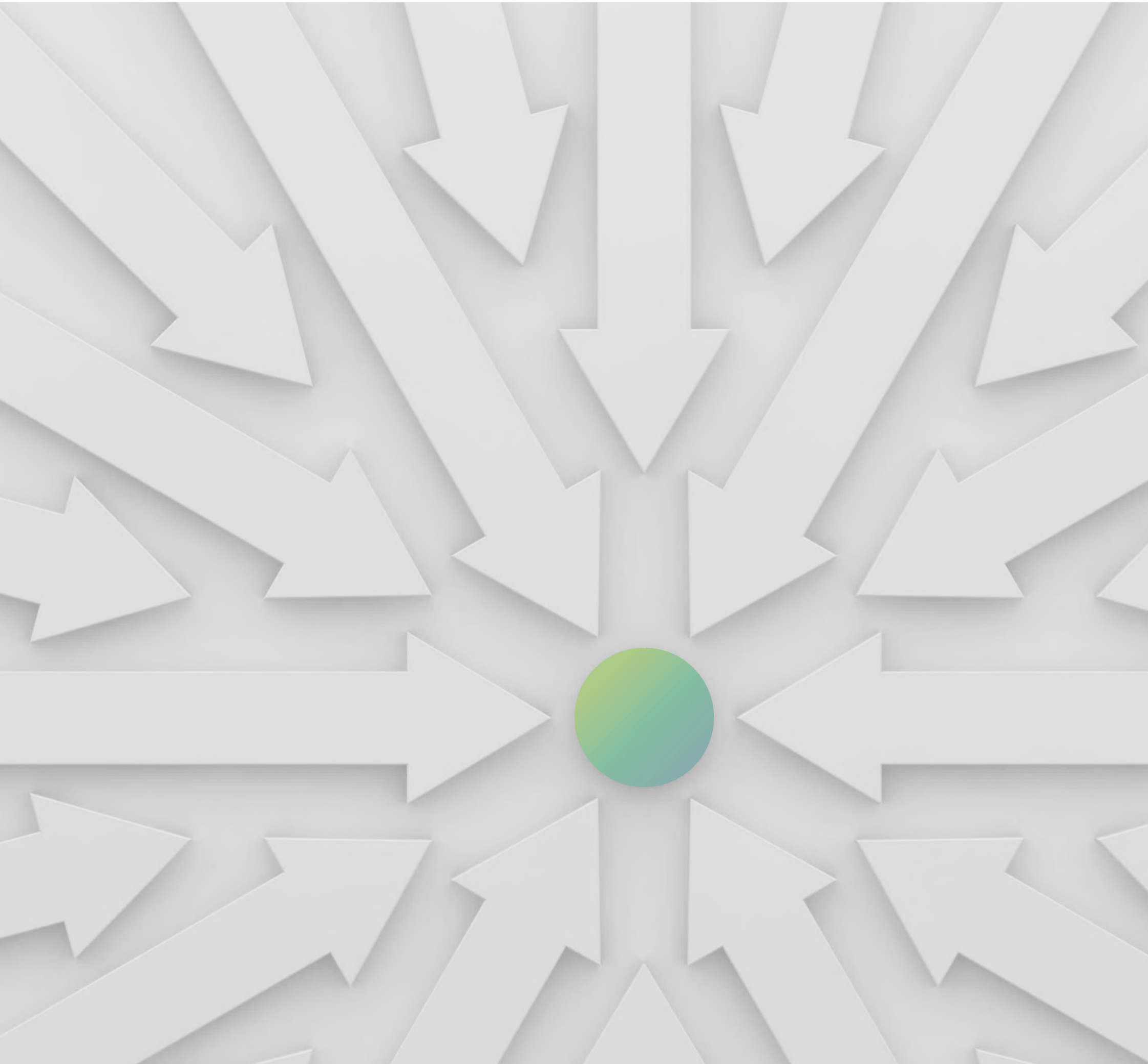
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Let's Have Lunch!

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Supporting Slides & Materials

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The journey begins with leadership.

- What experiences have you had partnering with other organizations?
- What do you view as the qualities and behaviors of a good partner?
- Are there experiences or circumstances that have made you hesitant to partner?
- What emotions come up for you as a leader when you hear terms like partnership or merger?

What is your organization's current context and desired future?



EXTERNAL

- Environmental Context
- Market Position
- Relationships



INTERNAL

- Financial Position
- Program Capacity
- Administrative Systems/Capacity




DIRECTION

- Desired Impact
- Future Strategy
- Leadership (transition?)



What are we building?

- What are the strategic alliance's objectives?
- **Task Integration:** What degree of interdependence is needed to achieve the shared objectives?
- **Coordination Costs to Complete Tasks**
- **Knowledge Transfer Among Players**



PURPOSE
defines
STRUCTURE

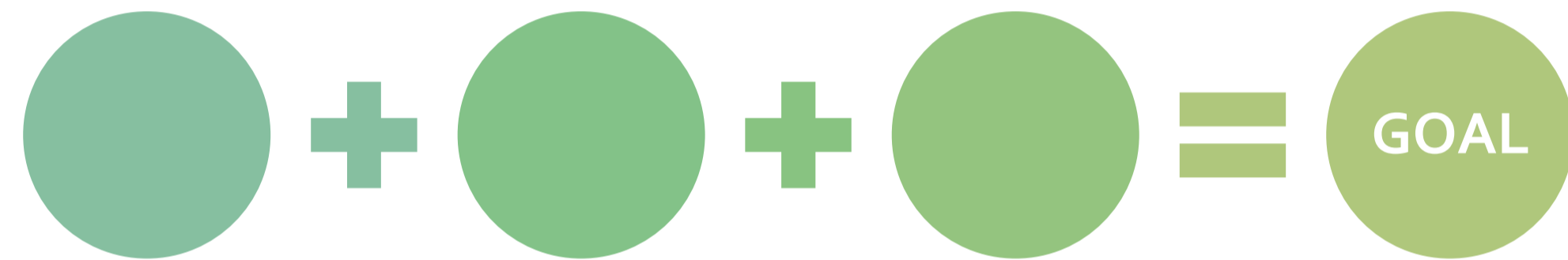
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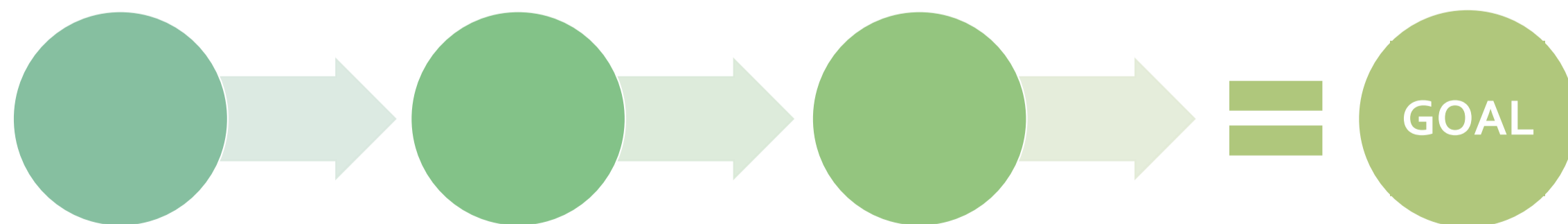
STRUCTURE
drives
BEHAVIOR

Kinds of Interdependence

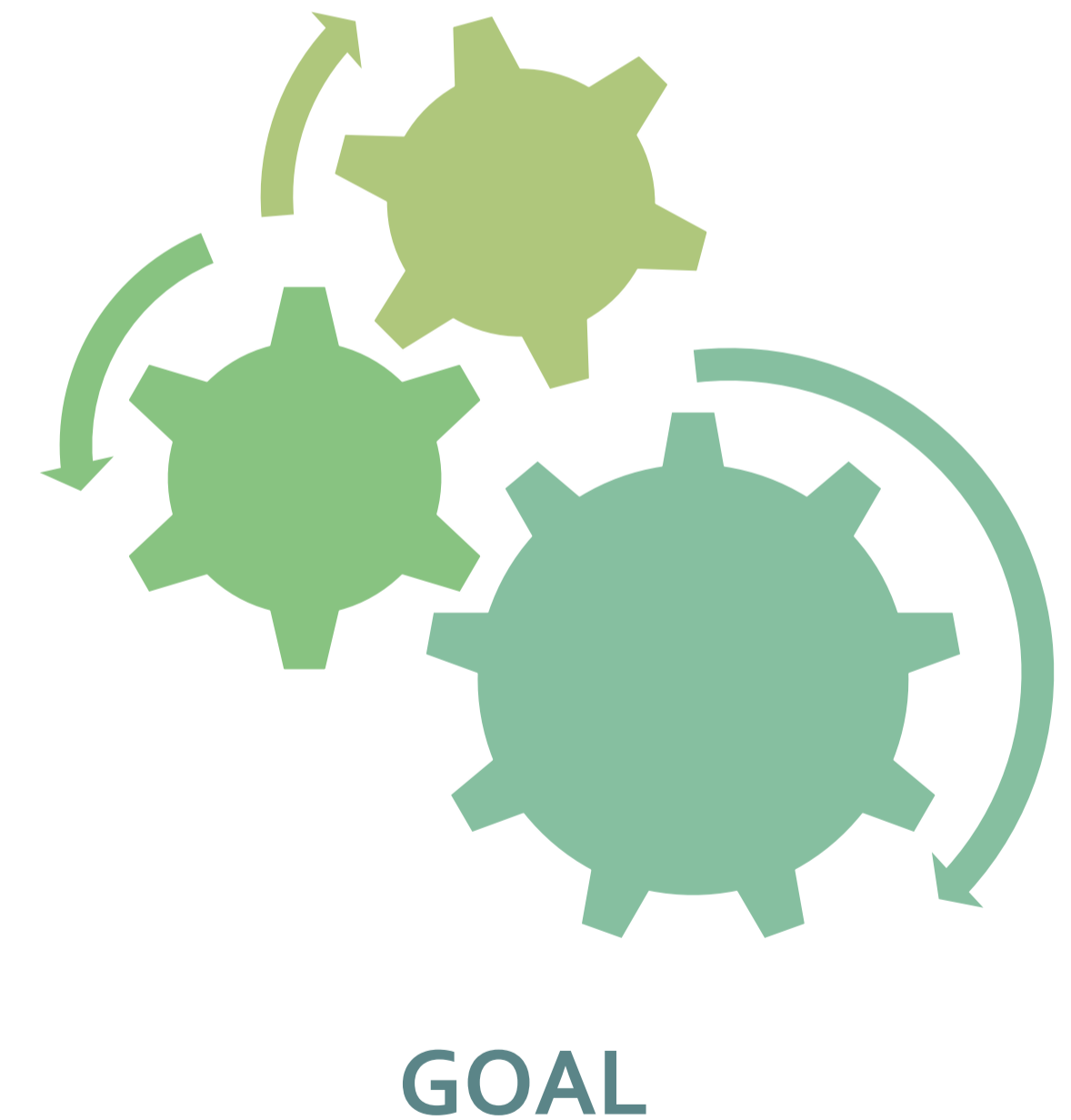
Pooled (Swim Team)



Sequential (Relay Team)



Reciprocal (Basketball Team)



Models for Consideration



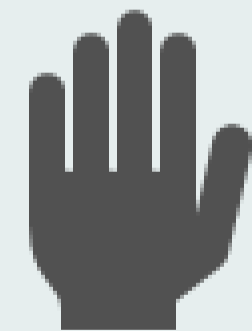


Program Coordination

Consider the degree of:

- Communication
- Information sharing
- Autonomy in decision-making
- Resource investment
- Risk

Coordination Model	Primary Purpose
Referral	Send clients to a trusted provider of related or wrap-around services
Situational Space Use and Client Access	Occasional use of a partner's space (office hours, event) to support mutual client access to related services
Common Intake / Coordinated Access	Create "one door" for clients to access services from cooperating providers



SHARE other examples of program partnerships. What behaviors drove its success or lack thereof?



Coalitions & Networks

Consider the degree of:

- Communication
- Information sharing
- Autonomy in decision-making
- Resource investment
- Risk

Collaboration Model

Primary Purpose

Policy Coalition or Association

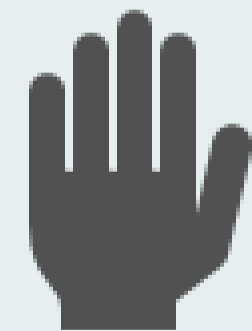
Joint advocacy, information sharing, mutual support

Collective Impact Coalition or Network

Collectively address a community problem or set of problems

Systems of Care

Care coordination to create a broader, more efficient array of services for a region or population



SHARE an example of your participation in a coalition or network. What behaviors drove its success or lack thereof?

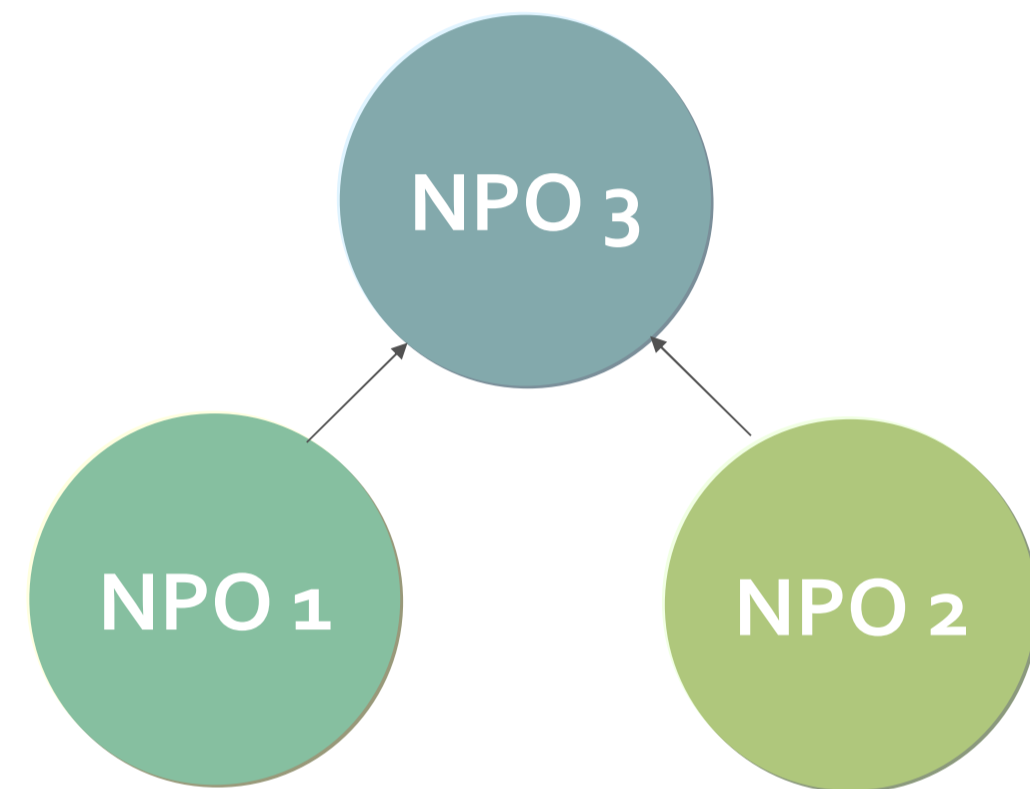


Joint Ventures

Consider the degree of:

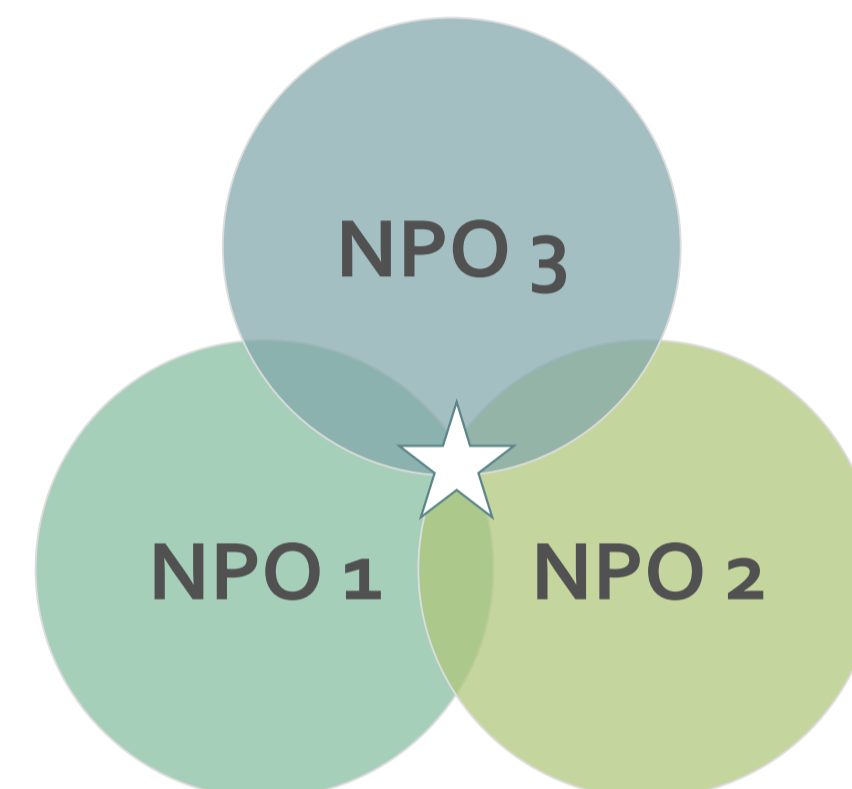
- Communication
- Information sharing
- Autonomy in decision-making
- Resource investment
- Risk

CONTRACTUAL JOINT PROJECT



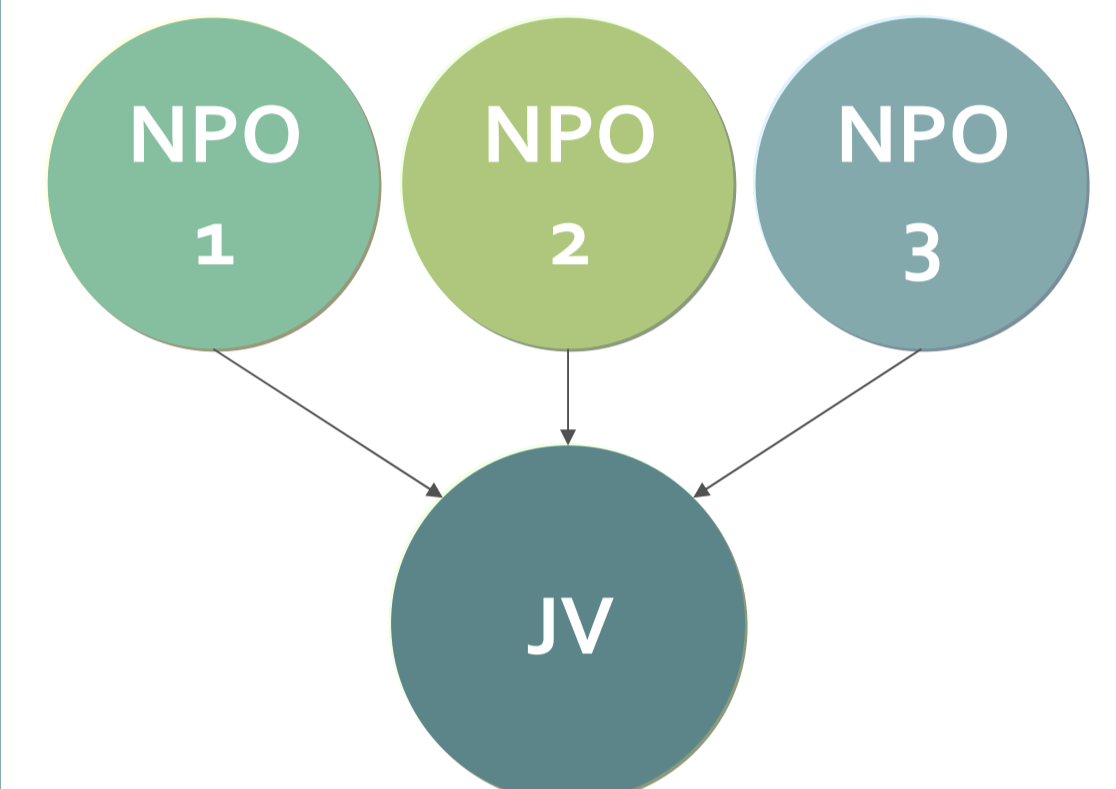
- NPOs contribute time, resources, and staff to a joint project
- Operations generally covered by a contract
- Shortest term, lower risk

PARTNERSHIP AGREEMENT



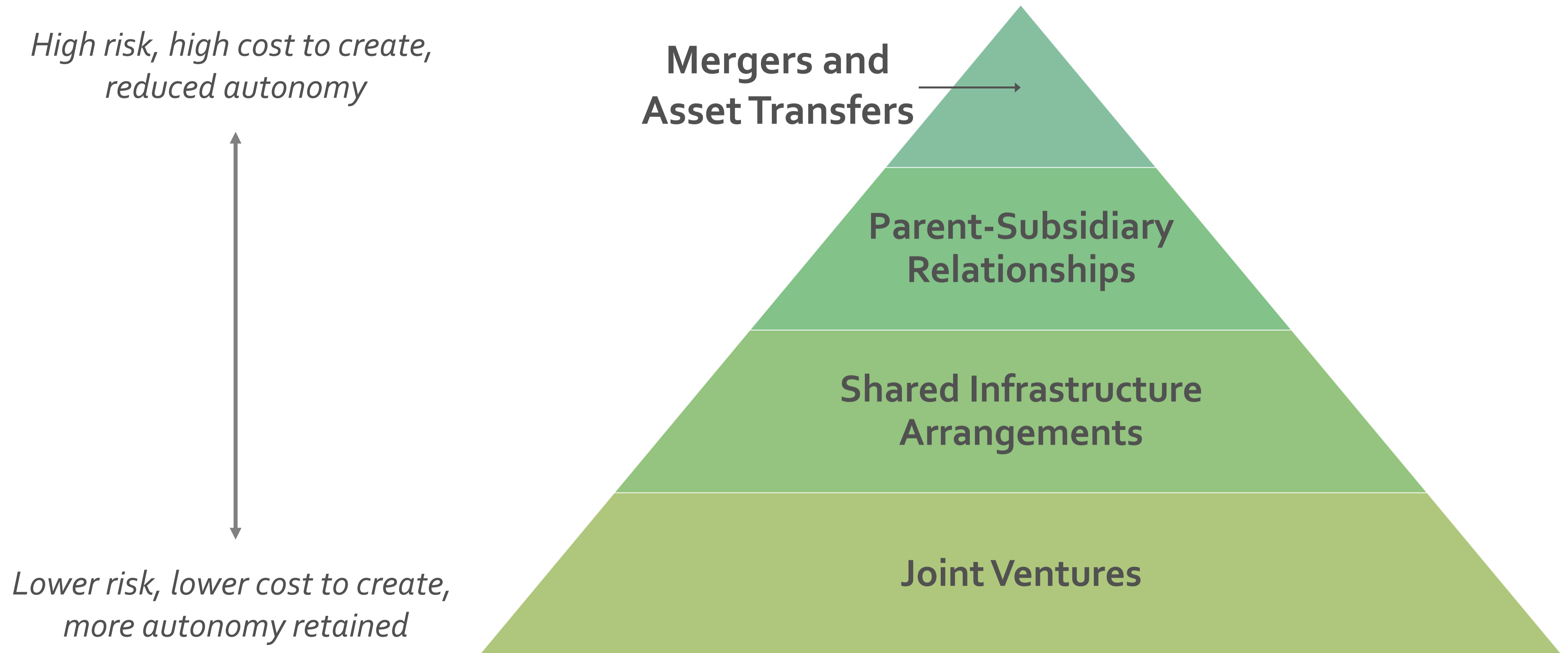
- NPOs use existing resources to create a shared program that leverages the strengths of partner agencies
- Governed by a partnership agreement

INCORPORATED JOINT VENTURE

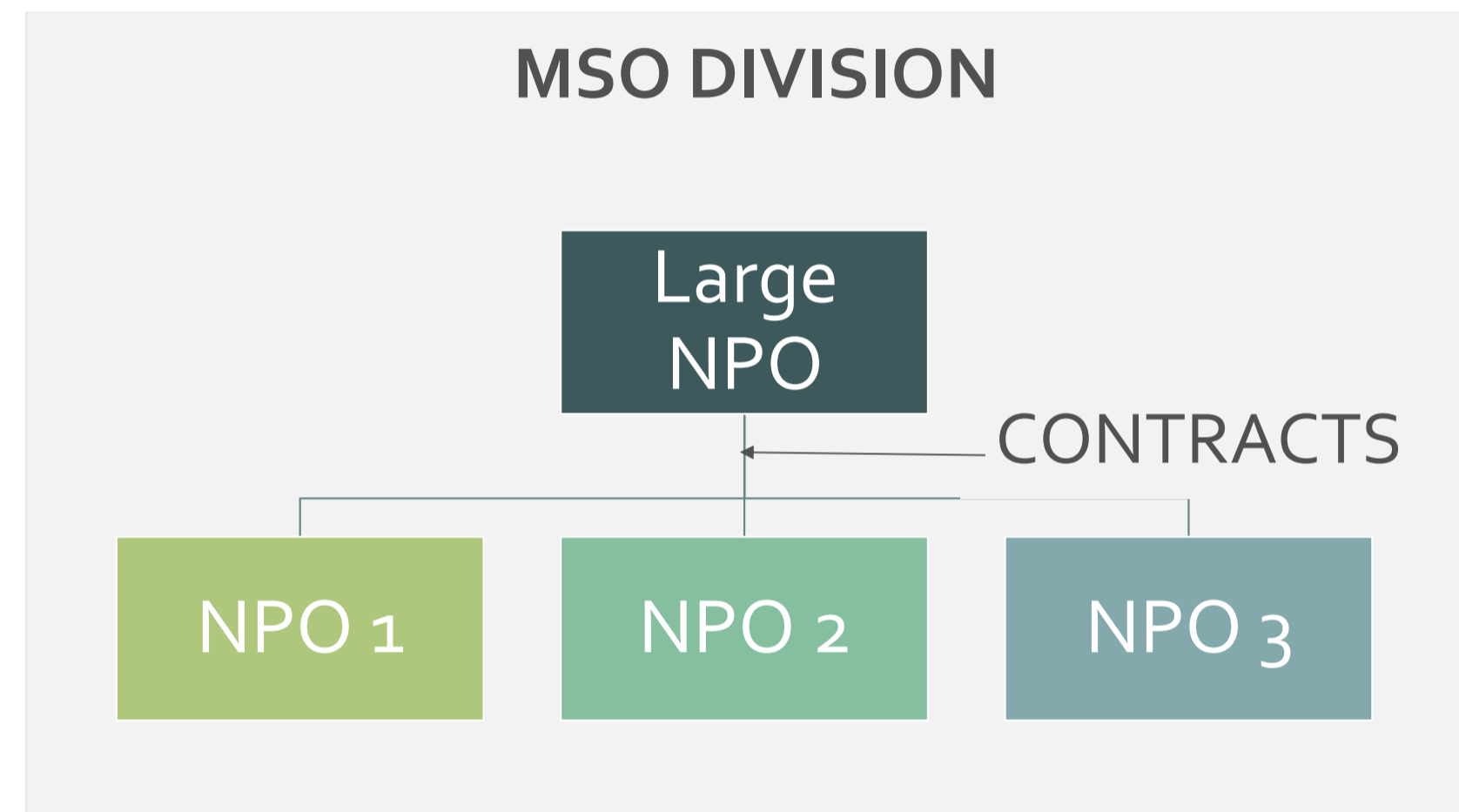
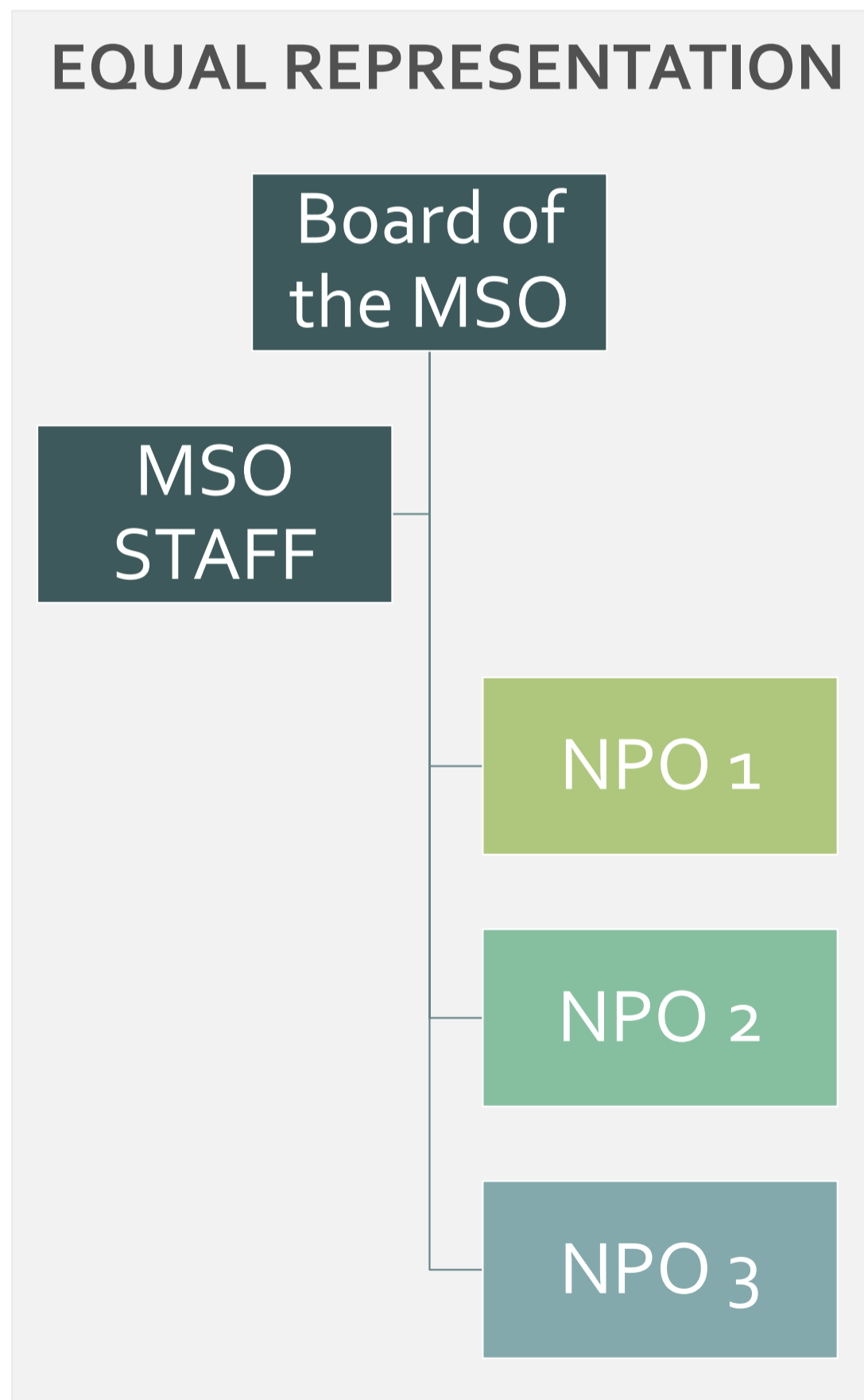


- NPOs incorporate a third entity that is jointly owned
- Has separate board & staff
- Useful when risk of JV is high, partners need liability protection

Consolidation Continuum



Understanding the Structures



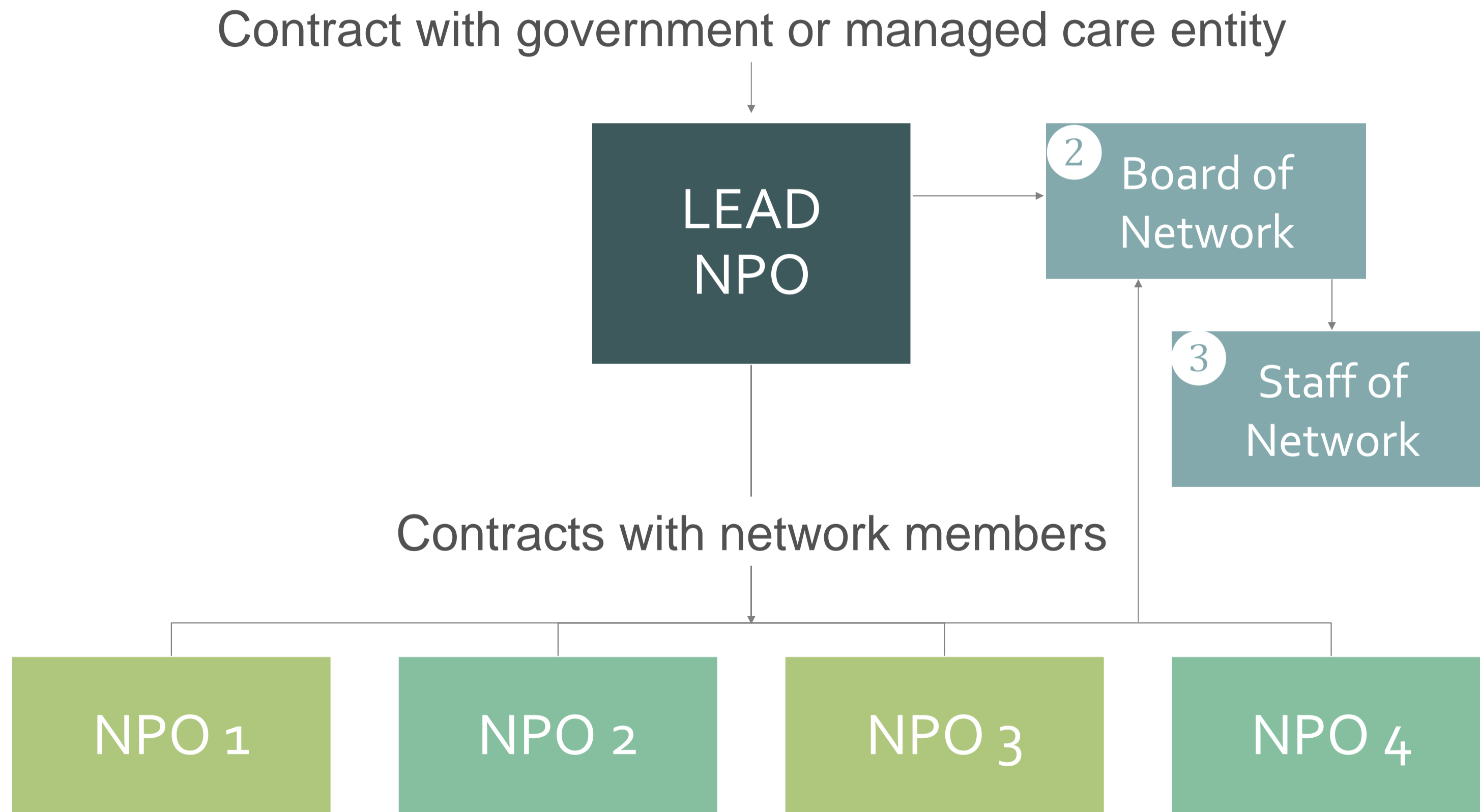
↑ A large NPO with mature management systems has excess capacity and offers that capacity to other NPOs on contractual basis.

← NPOs incorporate an MSO with its own Board (reps from sponsoring orgs) to house and provide specific management services. Users are members, no public sale of services.

Management Services Orgs (Shared Infrastructure Agreements)

- Consolidate overhead
- Joint purchasing
- Fiscal services
- Shared personnel and/or facilities
- Fundraising & marketing
- Info management & QA
- Joint planning

Understanding the Structures



Managed Contract Networks

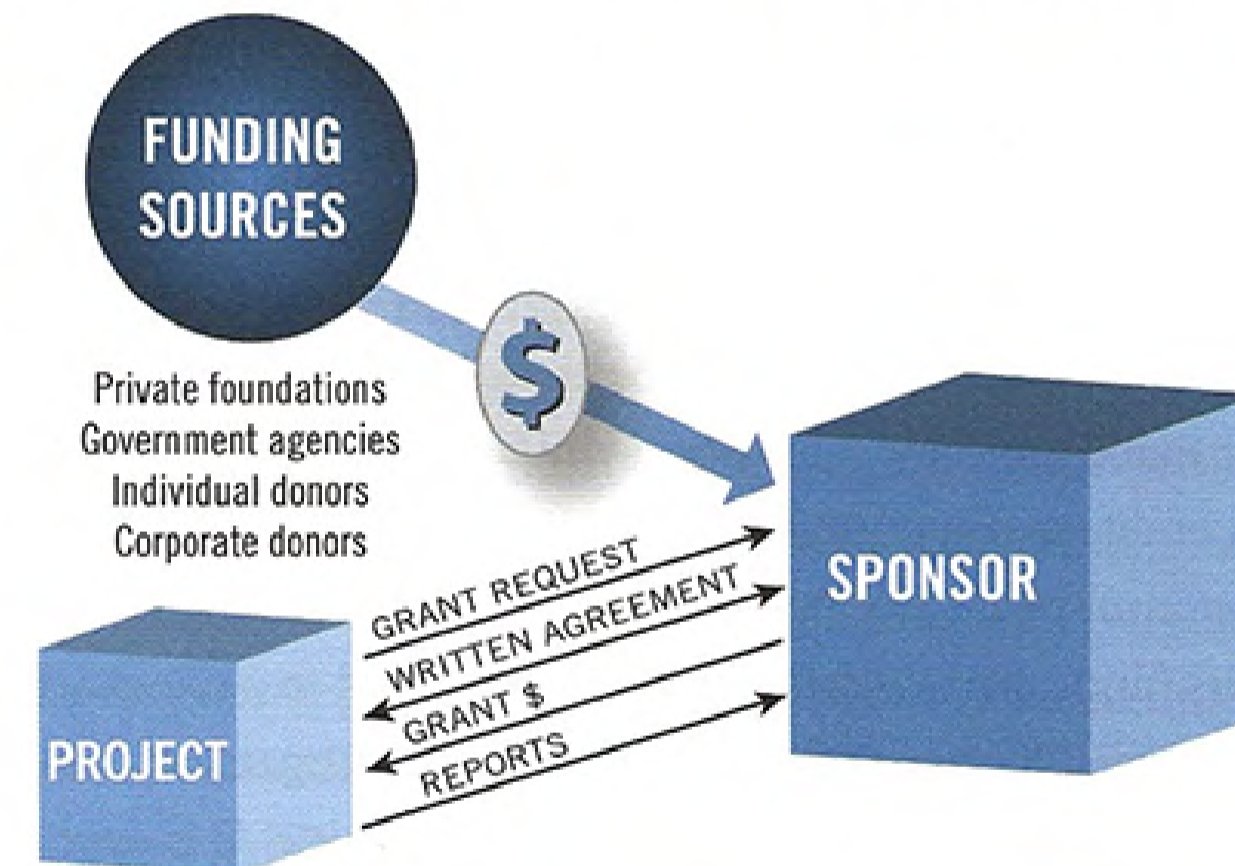
- Model 1: Lead agency service as the network administrator for a contract that includes many other nonprofits.
- Model 2: Contract is with the lead agency, which is accountable to both the originator and the Network Board. There are separate bylaws and an operating agreement among the members and lead.
- Model 3: Federation/MSO model that goes beyond a single contract and seeks to integrate several NPOs across programming, as well as management broadly. MSO has its own staff.

Understanding the Structures

MODEL A — DIRECT PROJECT —



MODEL C PREAPPROVED GRANT RELATIONSHIP



Source: *Fiscal Sponsorship: 6 Ways to Do It Right* by Gregory Colvin & Stephanie Petit

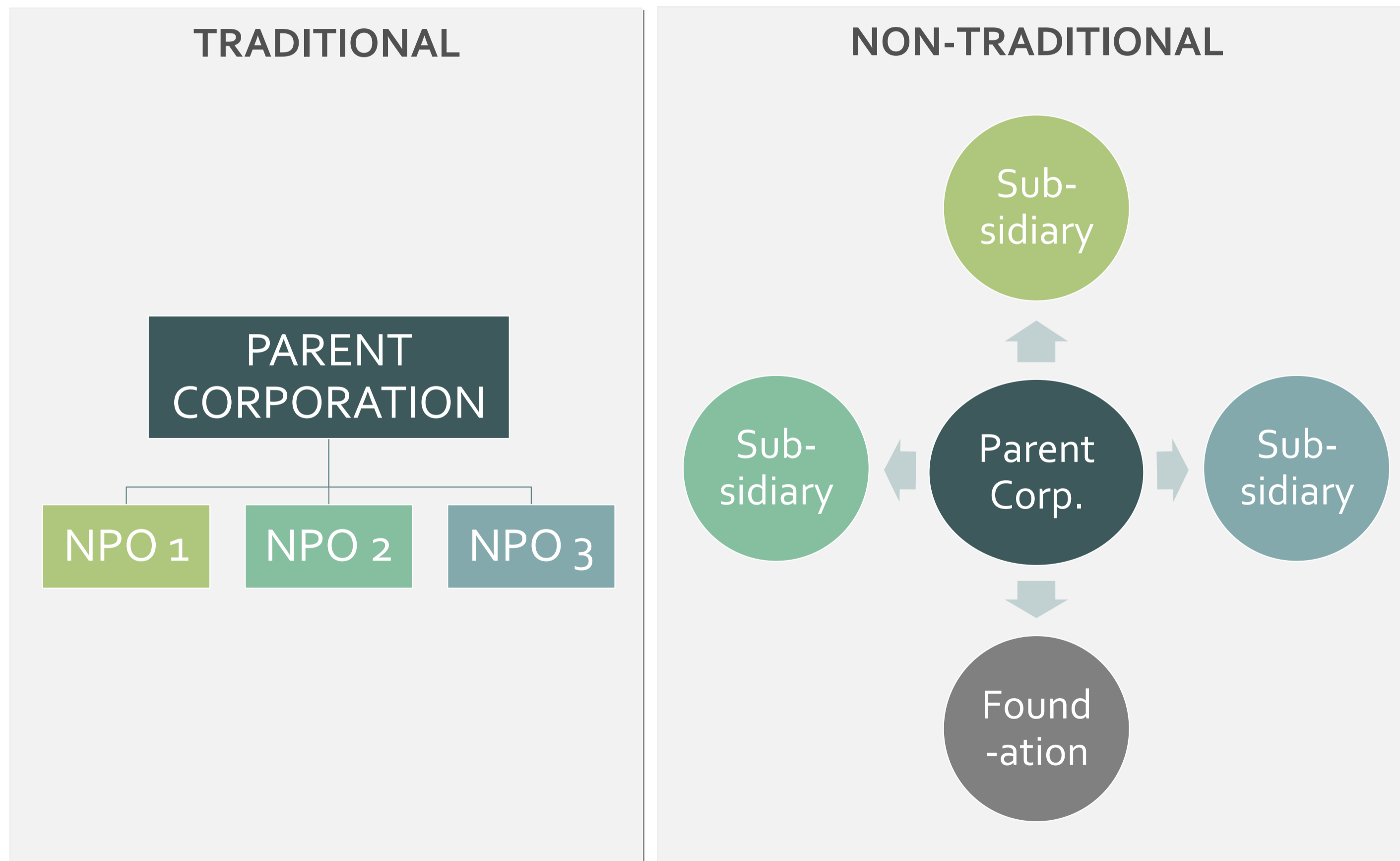
Fiscal Sponsorship

- The sponsor gets an asset that strategically advances its mission

The sponsored project gets:

- A temporary or permanent alternative to 501c3 status
- Ability to apply for grants and offer tax deductions to donors
- Core administrative support and reporting
- Access to capacity-building supports

Understanding the Structures

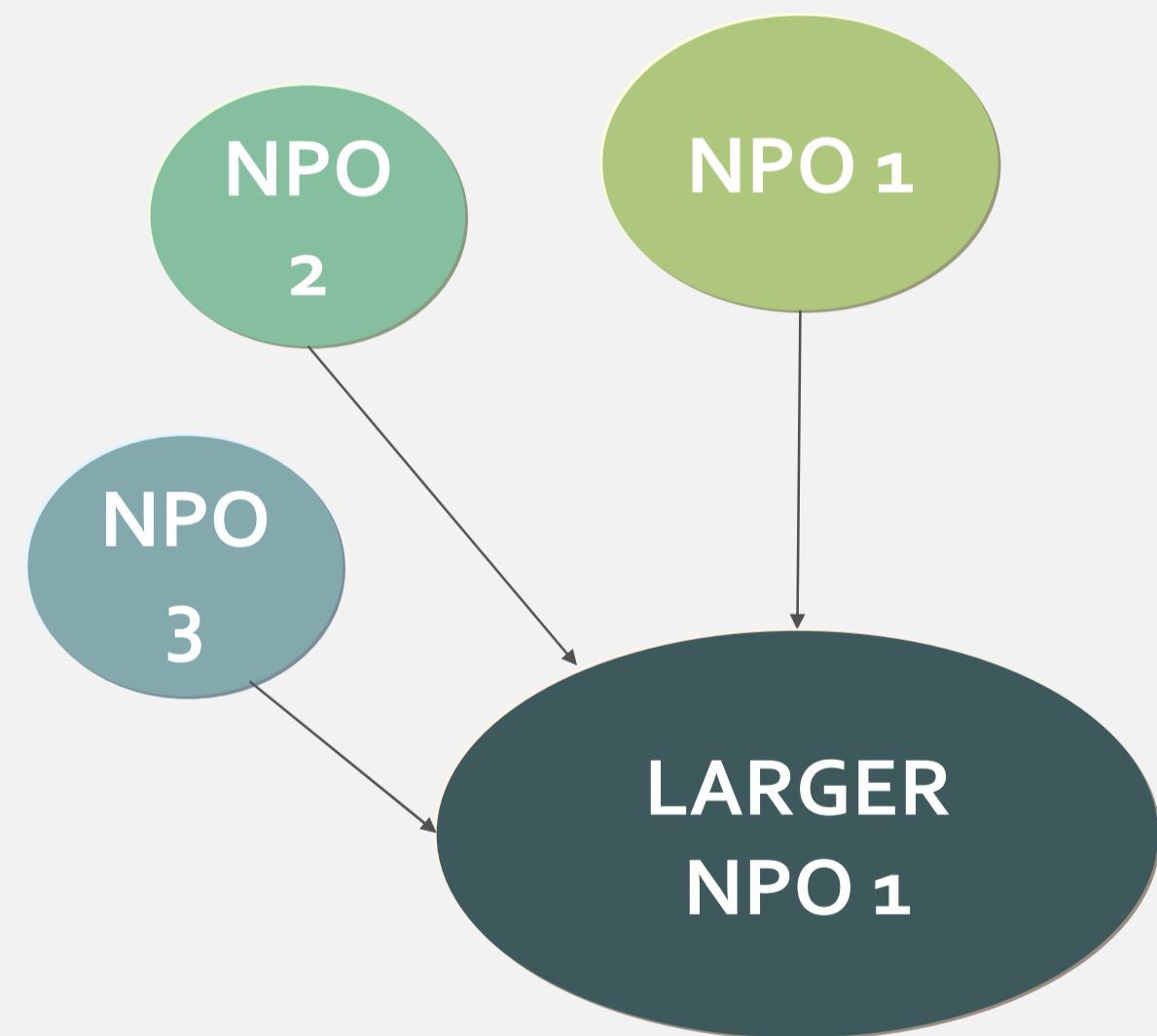


Parent-Subsidiary Relationships

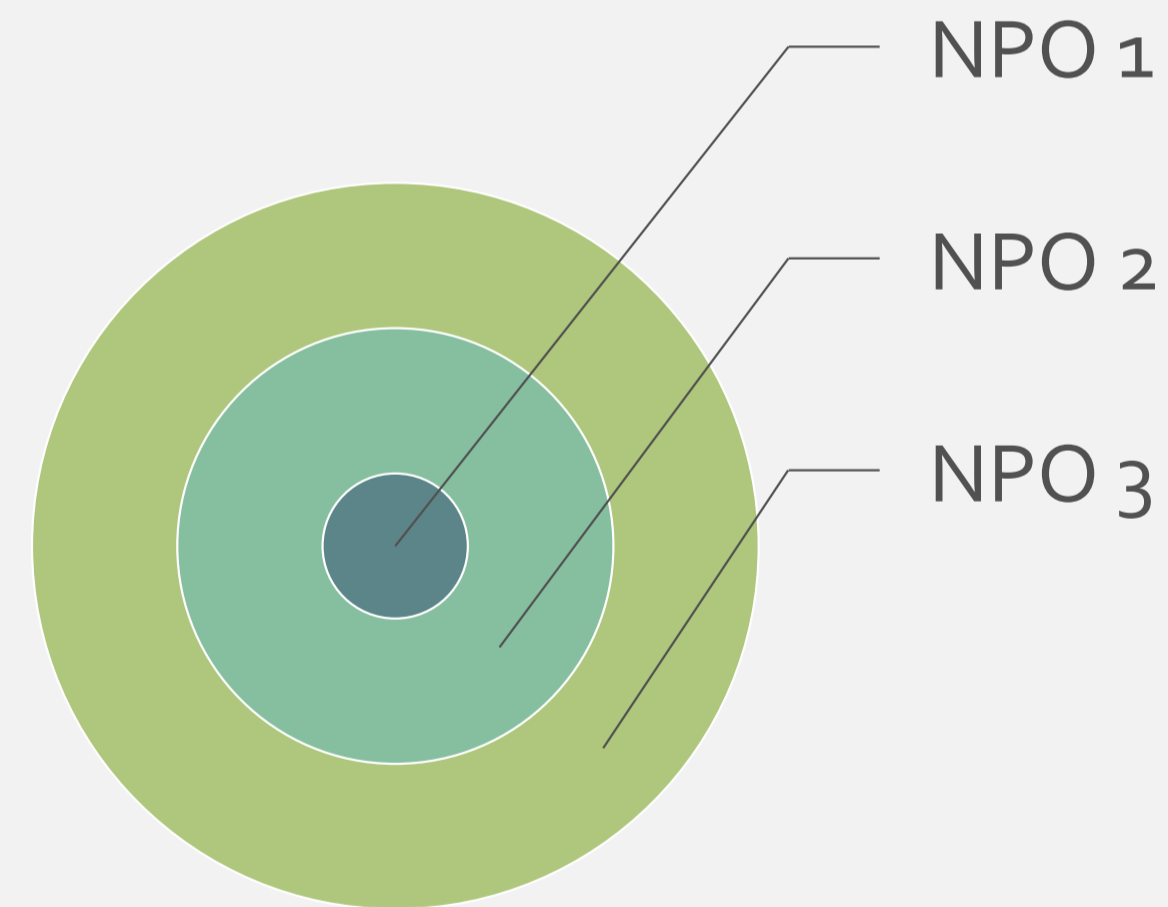
- Parent has corporate powers
- Can support a phased merger
- Service integration, accounting and liability separation
- Create financial stability for large, related entities
- Create subsidiary divisions within one large nonprofit

Understanding the Structures

RESULT IS A LARGER NPO #1



SOMETHING ENTIRELY NEW CREATED



Mergers & Asset Transfers

- Revenue diversification
- Economies of scale
- Reducing duplication of effort or competition
- Growth by acquisition
- Create multi-disciplinary approaches or continuum of care
- Create something new!