



## HFPG Consultant Convening Output Summary

A group of regional consultants gathered in November 2025 to build relationships and share perspectives around how the context for providing support for nonprofits was shifting and opportunities for strengthening collaboration and partnership in the greater Hartford region. The session was designed and facilitated by Anne Yurasek, Principal of Fio Partners.

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

### CONTEXT FOR OUR WORK: WHAT WE ARE SEEING

#### ACKNOWLEDGING OUR SHIFTING CONTEXT

#### ACKNOWLEDGING THE CURRENT MOMENT

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

**Continuing Funding Uncertainty & Instability:** Organizations are grappling with potential federal funding cuts, uncertainty about next year's budgets, overall financial instability, concerns about future government shutdowns, and rising healthcare costs through exchanges.

**Organizational Uncertainty & Reactivity:** Leaders are operating in an environment where "uncertainty is certain now and going forward," causing organizations to enter fight/flight/freeze mode, deprioritize strategic planning in favor of addressing immediate operational issues, and focus on "stuff right in front of us" while struggling to remain resilient and quick on their feet.

**Staff & Board Burnout/Turnover:** Nonprofits are experiencing significant board turnover and burnout, people leaving boards entirely, widespread staff burnout, continuing staffing challenges including succession planning gaps and brain drain, prompting leaders to finally acknowledge health and wellness needs of staff (and themselves!) and provide support resources like workshops for their teams.

**DEI Program Navigation:** Organizations are struggling to communicate DEI programs authentically while being mindful of potential federal cuts, wrestling with uncertainty about when and how to implement DEI initiatives, changing their verbiage around diversity work, and trying to create special events for specific cultures that still include all constituents.

**Managing Remote/Hybrid Work Expectations:** Many organizations are still feeling the impacts of COVID, particularly around the difficult pivot from remote work back to in-person operations, with some struggling significantly with this transition.

**Partnership & Collaboration:** Nonprofits are increasingly asking "can we go this alone?" and actively looking at partnership opportunities as mission work becomes more challenging to accomplish in isolation.

**Impact Measurement & Storytelling:** Poor evaluation practices are leading to unclear statistics and unknown impact, making it extremely difficult for organizations to tell their story effectively to funders and stakeholders.

**Workforce Shifts:** The sector is seeing an increase in independent consultants and facing immigration challenges that are affecting workforce availability and stability.

**Vulnerable Populations:** The pain felt by the most vulnerable members of the community is becoming more acute and real, intensifying the urgency of nonprofit work.

**Key Difference from May Meeting:** The shift from strategic/long-term planning to addressing urgent operational needs and immediate survival mode. The uncertainty about future funding remains the same.

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## HOW ARE YOU SHIFTING?

**How are you continuing to shift your own services? And approaches?**

### Shifts In Consulting Practices

- **Smaller Engagements:** Consultants are seeing fewer long-term, large-scale project investments and instead moving toward smaller engagements, faster and shorter projects focused on "quick hits," with expanded scrutiny around cost and time even as scope expands.
- **Fee Reductions:** Consultants are cutting fees, working with clients who are tightening budgets and doing more with less, getting creative with technology spending (smaller scopes of support, scaling back options to meet budgets), and literally shifting one body of work for another to meet increased or more urgent needs with fewer resources.
- **Longer Sales Cycle:** There is a lack of clarity in terms of future funding support for projects which is causing sales cycles to take longer, even as clients express needing more help for their

organizations. As an example, a client may want to undertake strategic planning but is unclear if that funding will be available, based on the uncertainty of funding in other areas of their organization. This causes decision-making/purchasing of services to take much longer than usual.

### **Shift In Nature of the Work: More Responsive Approaches**

- **Strategic Response:** The nature of strategic planning work is shifting from traditional long-term planning (which was previously funded) toward strategic response playbooks, scenario planning, and helping clients maintain focus on mission and stated organizational goals in uncertain times.
- **Manage Transitions:** Consultants are helping organizations pivot when facing severe funding losses (like an organization supporting immigrant farmers that lost most of its funding) and managing major operational transitions.
- **Diversify Funding:** Consulting work is shifting away from planning toward helping nonprofits raise funds, emphasizing the importance of diversifying revenue streams, and providing clients with more options for storytelling to attract donors. Major shift in focus to cultivating major donors, for those who have not relied on that funding historically.
- **Operational & Compliance Support:** Consultants are helping clients manage and understand new government executive orders, implementing data management and security protocols, and addressing immediate operational challenges.

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### **WHAT'S NEXT?**

#### **What are your clients preparing for or looking towards on the horizon?**

- **Survival Mode & Short-Term Focus:** Some clients are not looking at the horizon at all and are instead hunkering down, dealing with limited resources including budget cuts and staffing constraints, and not moving forward with planned programming.
- **Anticipating Funding Cuts & Cost-Saving Measures:** Clients are anticipating cuts and considering outsourcing as a way to save money, potentially choosing not to rehire positions or bring on new hires. Consultants are seeing an increase in interest in formal fractional leadership roles – like development, operations, and finance. A formal fractional role is when a consultant, on a contract basis or a part-time employee, will act as a member of the leadership team of an organization and often times, oversee more junior staff within a particular function. The fractional role is often designed to bring in specific expertise, set strategy, and/or provide oversight of a functional team, without the cost of a full-time position.

- **Preparing for Increased Basic Needs:** Organizations are prepping for more needs, especially basic ones like housing and food, with SNAP serving as an example of the heightened demand they expect.

## POWER OF PARTNERSHIP IN UNCERTAIN TIMES

### SHARING EXPERIENCES & REFLECTIONS

#### PARTNERSHIP REFLECTION

**What are the challenges with partnerships that you've observed? What are strategies that you would suggest or have observed to address those challenges?**

##### **Leadership Mindset and Perspectives**

- Partnerships are complicated by understanding relationship history and past competition for funding between organizations that are now considering collaboration.
- Organizations operate from a perspective of "just enough" because funders give them "just enough," leading them to take resources for granted and approach partnerships defensively rather than abundantly.
- Fears and emotions run high around partnerships, with failure being scary even though it may be a reasonable decision in some cases.

##### **Strategy and Culture Alignment**

- There are fundamental problems and questions around mission compatibility when organizations consider partnering.
- Organizations don't pay enough attention to understanding the two cultures before entering partnerships. Partners need to develop clarity on who they are and their personal brand prior to engaging in partnership discussions. In some cases, there may need to be intentional planning around the continued involvement of organization founders, who may embody the original organization's identity.

##### **Partnership Implementation:**

- Successful partnerships require being clear about which staff will stay in which roles and understanding what partnerships actually are beyond just mergers and acquisitions.
- Suggested strategies include keeping community need paramount through client-centered approaches, creating community solutions groups, and pursuing customer-driven collective impact models that prioritize those being served over organizational interests.

**What are examples of formal partnerships that you've seen/supported that were successful? What made them successful?**

##### **Alignment with Communities/Client Interest**

Partnerships that centered on serving specific community needs—such as historical education programs, financial literacy for youth, career exposure for underserved populations, and workforce development—were most impactful when they maintained clear focus on beneficiaries.

### **Cross-Sector Collaboration**

Effective partnerships brought together different sectors—such as business community and education, workforce development and school systems, industry and youth programming, and government funding with career exposure initiatives—to create comprehensive programs that leveraged each partner's strengths.

### **Strong Alignment**

Successful partnerships conducted collective impact assessments to compare mission, vision, and values to determine alignment before proceeding, with some mergers bringing together multiple small nonprofits whose cultures and values were closely aligned.

### **Examples of Models**

Partnerships succeeded when a non-viable independent organization became the education arm of a larger organization, and when organizations merged to create sustainability rather than struggling alone.

Successful collaborations identified and secured diverse funding streams to ensure long-term sustainability and created opportunities for ongoing collaboration.

### **Recognition of Need for Stronger Pre-Planning**

Even successful mergers faced challenges when they brought all existing missions and programs forward without prioritization, resulting in scattered new organizations that needed to refocus their efforts.

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## **RECOGNIZING THE SITUATION:**

**How have you approached working with organizations who are in financial distress? What information is most useful? What strategies help in having difficult conversations? With staff? With Boards?**

- **Gathering Essential Financial Information & Data:** Consultants need access to good data including financials, income statements, balance sheets, budgets, and compliance requirements, while also examining the organization's financial history to help non-financial people fully understand the whole picture and providing board education on reading financial statements.
- **Defining the Problem & Risk Parameters:** Success requires identifying what financial distress actually means for the specific organization, determining their tolerance for risk, clarifying what the core mission is, understanding the current state, and taking a risk-based approach to compliance and operations.

- **Communication with Both Staff and Board:** Working effectively with both groups requires empathy, curiosity, openness, and flexibility, while also getting everyone on the same page between board and staff to align on reality and solutions.
- **Proactive Stance & Boundaries:** Consultants emphasized the importance of setting boundaries and being proactive instead of reactive, while also navigating the challenge of urgency as an outside person when the board may have a different opinion or be in denial.
- **Right-Sizing Strategies:** Practical approaches include suggesting right-sizing operations, considering layoffs or not hiring for vacant positions (downsizing), exploring earned revenue opportunities through fee-for-service models, and ensuring the client is doing things correctly operationally.
- **Partnership Considerations:** In some cases, getting organizations aligned around potential partnerships becomes part of the financial distress solution.

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## PARTNERSHIP OPTIONS IN CRISIS

### What partnership strategies have you seen be successful in addressing a financial crisis?

- Successful crisis partnerships focused on **values alignment** and iteration of what is truly important to ensure compatible organizational fit during vulnerable times.
- Organizations used **affiliations** to expand opportunities, such as developing social enterprises and creating new revenue streams that leveraged partnership resources.
- Implementing **outsourcing strategies** with budget-friendly vendors helped organizations reduce operational costs while maintaining service quality.
- Leveraging impactful partnerships with **individual donors** proved successful, with some major donor relationships resulting in transformational gifts that stabilized organizations in crisis.

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## SUPPORTING DECISION-MAKING

### What consulting strategies can support leadership decision-making in a crisis?

- **Creating Safe and Honest Dialogue Spaces:** Successful strategies included creating safe spaces for frank discussion, incorporating more executive sessions in board meetings for board

members to be honest, and helping organizations get out of fight, flight, freeze mentality by creating space for productive decision-making.

- **Transparency and Timely Information:** Providing information in a timely manner with full transparency, while breaking down information in a more simplified and digestible way, helped stakeholders make informed decisions under pressure.
- **Alignment Between Leadership Levels:** Ensuring staff leadership and board were on the same page proved critical for moving forward with crisis decisions effectively.
- **Risk Clarification and Analysis:** Clarifying the risk and return of risk decisions helped organizations weigh options more objectively during high-stakes moments.
- **External Objectivity:** Consultants serving as the outside voice of reason provided crucial perspective when internal stakeholders were too close to the situation or emotionally invested.

## HOW CAN WE SUPPORT PARTNERSHIPS IN THE REGION: A MAPPING EXERCISE

Consultants in attendance provided their suggestion for how consultants can offer support through the partnership development process.

### Preparing to Partner

- Mission/Vision: Hone strategic priorities and purpose\*\*
- Board Facilitation\*\*
- Executive Coaching – Define the Why
- Does the organization really want to do this?
- Strategic evaluations
- Capacity Assessment
- Assess back-office needs and capacity (Finance, HR, IT, Facilities)
- Recognize and name the organization's inability to fund appropriate staffing (low pay, overreliance on volunteers and Board)
- Recognize working Board over-investment in the staff and operations roles

### Selecting a Partner

- Conduct stakeholder interviews and/or focus groups, scan of community needs
- Utilize external contacts to connect/broker connections
- Make connections and strategies around collaborations
- Partner selection process:

- Scan potential partners
- Conduct due diligence and interest
- “Date” most compatible partners to assess
- Identify core values of both organizations and assess alignment

### **Envisioning Shared Work**

- Ensure a client-centered approach to developing future strategy
- Customer driven collective impact strategy development
- Coaching – Strategy
- Facilitation of difficult conversations
- Network identification / collaboration
- Have multiple, frank, one-on-one conversations
- Recommended resource: “Nonprofit Merger Workbook” by La Piana Associates to facilitate conversations

### **Develop and Enact Agreements**

- Implementation tools (tailored)
- Pro Bono Partners can help with developing/drafting agreements
- See a lawyer first
- Agree on review/strategy
- Establish clear governance structure
- Strategize roll-out publicly – how to communicate

### **Post-Enactment Integration and Implementation**

- Culture alignment and values/behaviors
- Team building and staff support
- Communicate plan to donors and constituencies
- Monitor program outcomes and communicate with stakeholders
- Risk mitigation strategies and decisions
- Put “why” into action
- Action plan/implementation roll out
- Build/integrate data system\*
- Integrate benefit plans, HR policies and processes