



Owning Our Future

Series 2:
Mergers and Collaborations
November-December 2015



pwc



Australian
Charities and
Not-for-profits
Commission

Westpac

Community Council for Australia

The Community Council for Australia is an independent, non-political, membership organisation dedicated to building flourishing communities by enhancing the extraordinary work undertaken by the charities and not-for-profit sector in Australia. CCA seeks to change the way governments, communities and not-for-profits relate to one another.

CCA provides leadership to the sector by being a national voice and a facilitator for sector leaders to act on common and shared issues affecting the contribution, performance and viability of not-for-profit organisations in Australia. In this way CCA is a catalyst for the sector to work in partnership with government, business and the broader Australian community in order to achieve positive change.

Outcomes from this leadership include:

- promoting the values of the sector and the need for reform
- influencing and shaping relevant policy agendas
- improving the way people invest in the sector
- measuring and reporting success in a way that clearly articulates value
- building collaboration and sector efficiency
- informing, educating, and assisting organisations in the sector to deal with change and build sustainable futures

Our success will drive a more sustainable and effective not-for-profit sector in Australia making an increased contribution to the well-being and strength of all our communities.

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Our partners

Community Council for Australia thanks our partners for their support and involvement in the Mergers and Collaborations CEO Forums, November-December 2015

Myer Foundation



Sidney Myer, a generous philanthropist in his lifetime, left a portion of his estate upon his death in 1934 to be invested for the benefit of the community in which he made his fortune. That act created the Sidney Myer Fund which will exist in perpetuity and the income from that initial investment will be distributed annually. The Myer Foundation was established in 1959 by Sidney's sons, Baillieu Myer AC and the late Kenneth Myer AC DSC, as a way to support initiatives and new opportunities arising from contemporary issues. The Myer Foundation was further endowed through Kenneth Myer's estate following his death in 1992.

PwC Australia



PwC Australia helps organisations and individuals create the value they are looking for. They are a network of firms in 157 countries with more than 184,000 people who are committed to delivering quality in assurance, advisory, tax and legal, and private client services.

PwC is one of Australia's leading professional services firms, bringing the strength of their global network of firms to help Australian businesses, not-for-profit organisations and governments assess their performance and improve the way they work.

ACNC



The Australian Charities and Not-for-profits Commission (ACNC) is the independent national regulator of charities. The ACNC has been set up to achieve these objects:

- Maintain, protect and enhance public trust and confidence in the sector through increased accountability and transparency
- Support and sustain a robust, vibrant, independent, innovative not-for-profit sector
- Promote the reduction of unnecessary regulatory obligations on the sector.

Westpac



A major provider of banking services for the sector - provided the venue and helped facilitate additional merger and collaboration forums in the ACT and NSW.

Background

In October and December 2015, CCA staged a major campaign to promote more robust discussion of mergers and collaborations. This campaign included extensive media (supported by MediaKey in Melbourne) and a series of national forums held with the generous support of the Myer Foundation and PwC in Sydney, Perth, Melbourne and Brisbane. Two additional forums were held in early 2016 supported by Westpac.

The focus of the forums was the #GoodSave case study presentation by Jayne Meyer Tucker, Founder of JMTinc and former successful CEO at Good Beginnings Australia, who outlined the ideas and practicalities that drove the merger of Good Beginnings Australia and Save the Children Australia.

Guest panelists included David Crosbie, CEO of CCA; experts from PwC; and Commissioners from the Australian Charities and Not-for-profit Commission. An additional forum in Canberra was held in partnership with Westpac.

In all a total of 110 Australian CEOs and board leaders from a broad cross-section of the not-for-profit sector attended the CCA forums (see Appendix 1) for the purpose of both sharing their views on Mergers and Collaborations and also to learn more about the “whys” and “hows” along this path.

The forums promoted discussion and provided feedback from Australia’s NFP leaders on the pros and cons of collaborations and mergers. The words of one forum attendee summed up the general feeling amongst attendees:

“... mergers and collaborations are a journey and one should not be frightened to opt in if appropriate and opt out if a proposed arrangement is not right ... but it is also important to be brave in thinking outside the box, to be brave in pursuing your purpose”.

The media component of the campaign attracted significant national coverage. Both CCA CEO David Crosbie and CCA Chair Rev Tim Costello engaged in more than 20 media interviews with national and metropolitan press and broadcast media. The key messaging throughout was that it was time to ask sector leaders to put self-interest aside and work together rather than competing against each other (see Appendix 2).

On the whole the public and sector response to this message was positive and there was strong supportive social media. The small handful of critics questioned whether CCA was arguing for “large against small”, which does not reflect the CCA position or most of the media where the clear position put was that sometimes small is the best way to achieve a purpose.

CCA are very grateful to be supported in conducting these forums and the associated media campaign by the Myer Foundation, PwC, the ACNC and Westpac.

mergers and collaborations are a journey and one should not be frightened to opt in if appropriate and opt out if a proposed arrangement is not right

Executive summary

Why mergers and collaborations?

The not-for-profit sector is a remarkable success story in Australia. Growth over the last decade has averaged more than 7% a year, outstripping any industry group. Turnover grew from \$46 billion to more than \$105 billion in less than a decade.

The reality is that this growth will be difficult to maintain. Increases in government revenue have stalled, levels of giving as a percentage of average income have not returned to pre global financial crisis levels, and there is increasing competition from both not-for-profit and for profit organisations in many areas of service delivery.

Competition breeds division. Charities competing for income highlight their differences rather than their similarities. While competition can have some positives, a divided sector is less able to serve our communities well. It can also lead to inefficient and ineffective strategies, depending on what is being rewarded through competition. The governance structure and approaches that may have served organisations well during the good days may no longer be as appropriate in tight times.

Merger may be a dirty word for many, but that should not stop consideration of possible consortia, partnerships, and collectives, all versions of collaboration that need to be higher on our agendas.

Small can be beautiful. Many smaller charities are closer to their communities and better able to respond to local issues. They often drive innovation and provide a measure of dynamism to the sector by encouraging new ways of doing things. Ensuring smaller organisations can continue to be effective in their communities may mean encouraging stronger collaborations offering more back office support and relieving some of the 'administrivia'.

Charities and not-for-profits serving the same communities may need to work much harder at collaboration and possible mergers ... not just because it is in their interests, but also in the interests of the communities they serve. The options should, at least, be part of any scoping exercise in forward planning discussions.

The CCA advocates that the best way to drive change within the sector is to work directly with sector leaders, providing opportunities to engage with peers and external experts in a safe and open discussion about where their organisation is, and how it can be improved. This report reflects this approach in addressing a critical issue for the future of many charities and not-for-profits across Australia.

Competition within our sector promotes division. There is still a long way to go if more effective collaboration and mergers are going to become accepted practice in our sector. Hopefully this report will contribute to that journey.

Merger may be a dirty word for many, but that should not stop consideration of possible consortia, partnerships, and collectives, all versions of collaboration that need to be higher on our agendas.

Summary of recommendations and key messages

Recommendations

The following recommendations are put forward with one very clear caveat – it is the purpose of an organisation that matters most, not its size, location, structure, history or financial position. Achieving purpose should be the prime focus of any charity. Organisations that regularly review and refine their capacity to fulfill their purpose are the most valuable to our communities.

- All new charities should have to consider whether their intended purpose is best achieved by creating a whole new organisation, or whether their purpose could be better achieved by pooling their energy and commitment with an existing organisation that shares the same goals. This requirement to consider not establishing a new organisation should be part of the ACNC registration process.
- There should be regular monitoring and review of both the existing distribution of charities and new charities through the ACNC data base. This information needs to be publicly available to help inform any considerations relating to the creation of new charities, mergers and collaborations.
- Accessible independent advisory services are needed for charities and not-for-profits considering mergers and collaborations.
- Consideration should be given to setting a limit on charity Board Directors terms – while some long serving Board Directors provide valuable advice and support to an organisation, long term Board Directors not willing to let go of their roles was clearly identified as a barrier to effective collaboration and merger.
- Federated structures need to have a very clear rationale justifying the high level of duplication inherent in having one name and one purpose, but nine self-governed and administered organisations operating across Australia
- All mergers and collaborations need to be approached with caution, and considered on their merit taking into account not just the economics, but also the importance of relationships in achieving purpose. Bigger is not always better if purpose is not consistent.
- Where purpose can be better achieved through a merger or collaboration, and where savings can also be achieved or be better directed to a purpose, mergers and collaborations should be encouraged.

Achieving purpose should be the prime focus of any charity.

Key discussion points

Key points by attendees

It was generally agreed that the most important issue in any merger or collaboration is being very clear about the purpose of the organisation and what activities it is seeking to undertake.

It was clear from all the forum discussions that many of the attendees were in the process of at least considering merging or some kind of collaboration. Reasons for this interest varied, but a common theme was the growing awareness by the leaders that they were operating in an environment where they were increasingly needing to compete with other organisations for a smaller bucket of money in order to undertake their current activities. At the same time, increasing red tape, growing compliance costs and back-end operations were placing additional pressures on their limited resources.

There was acceptance by some leaders that mergers and / or some form of collaboration had become essential in order for the work of their organisation to continue and for optimal benefits to clients and the community to be achieved.

Many organisations had commenced the merger journey and were happy to share their observations on what worked and what did not.

Many were at the stage where they could see the merit in a merger and were considering their moves in this direction.

It was generally agreed that the most important issue in any merger or collaboration is being very clear about the purpose of the organisation and what activities it is seeking to undertake. Where the purpose and activities of organisations vary, the activities being undertaken require different skills and knowledge. It will often take more time and effort to develop common goals in a merger or collaboration.

Most participants enjoyed the opportunity to learn from others including the knowledgeable panelists who shared their expertise and experience from a range of perspectives.

The story of the #GoodSave merger, (see Appendix 3) as shared by former Good Beginnings CEO Jayne Meyer Tucker, was a powerful example of the how, why and when a merger is the right path to take.

Quotes on core issues

There were many points that emerged within the merger and collaborations Forums. In many ways, it would be wrong to pick out just a few of the issues beyond the core recommendations which are based on widely shared perspectives. CCA has therefore adopted the approach of presenting a broad range of quotes and some of the questions asked during the forums. It is hoped this listing of quotes from all six forums conveys the true flavour of the discussions, and broadly reflects the views of many in the charities and not-for-profit sector.

Ensure that you embed in the discussions the processes that will follow

At the end of the day the ONLY consideration is the purpose / outcomes for the people who are receiving the service – not the organisation, not the board, not the staff.

Need to have some things in common – champion, shared purpose, risk-taking appetite for growth, positive relationship between board and executive.

Process takes time – egos could be burnt, people will leave the organisation, there will be costs and benefits and disadvantages.

Need to take all the stakeholders along with you ie donors etc.

All parties in a merger should have a shared commitment to the desired outcomes.

For any merger to be realised you need to be able to articulate the benefits.

It's not often that you get a merger driven by purpose rather than necessity whereas it should be other way around.

Ensure that you embed in the discussions the processes that will follow.

It is best to plan and execute mergers when both organisations are strong.

Discussions around possible mergers can be disruptive so organisations need to find ways to mitigate against this as much as possible.

While there are often cost-savings to be had in reducing duplication, there needs to be some money on the table at the start for costs associated with new branding, staff development, etc.

There is a strong need to consider – does the model serve constituents better?

The culture clash between two different organisations is never easily resolved.

As a charity we have a responsibility to use the donations given to us as wisely and effectively as possible.

Governments prefer to fund a single entity rather than a whole lot of individual organisations each with their own risk and ways of working.

“Survival mode” doesn’t necessarily mean survival of an organisation but of the work ... the test has to be about purpose.

There is no need to have a separate board and separate governance structure in order to have local input or a separate identity. You can do that in so many other ways that do not require separate legal entities, separate administrations, and separate everything else.

As part of a larger organisation you have benefits such as increased access to specialist skills, group buying power, etc.

There is an issue when people are wanting to start up new charities to provide a service in an area that is already flooded with organisations – medical research foundations being a good example. Often these would be better served by choosing an existing charity and raising funds for them. Common sense should say that if someone is doing this well already why reinvent the wheel.

Size does matter – small is becoming more difficult to be sustainable. This is not the 1970s. If a merger means my position becomes redundant in order to deliver more services to those in need, so be it.

Federated structures are a triumph of ego over purpose – they make no sense.

“Survival mode” doesn’t necessarily mean survival of an organisation but of the work ... the test has to be about purpose.

In federated models you do get a lot of politics. The structure does not work – people compete internally to do things themselves while stopping others from doing them.

Rescue mergers may occur ie where you have an organisation providing a useful service but is on the brink of insolvency and a stronger organisation can ensure their work continues.

Many Federal Government contracts are requiring all partners to fulfill risk and compliance mitigation measures, which is placing a disproportionate and onerous amount of work on small organisations.

There is no consensus regarding mergers and collaborations as ways forward for the sector. A lot more sector discussion, analysis, relationship building and skills development are needed.

Some mergers are like two drowning people clutching each other – it is too late – they are both going down.

They (the prospective merger partners) were open to what we were talking about and we were having enough of a dialogue to take the next step. You need at least to have this conversation to start with, and, as things invariably start unravelling, you need to revisit these starting conversations about purpose.

Fear of failure along with a fear of treading on toes often stops some organisations from considering mergers.

Strong egos can be a barrier. One or two strong individuals on a Board or in an Executive role who are opposed to change can permanently undermine mergers.

Sometimes the people you want to move don't get the message but the ones you don't want to move do!

Knowing your purpose, knowing how you measure your success, is critical to any merger planning.

There are three key reasons that organisations may consider a merge – generally they are looking to improve bottom line, value add, and transform their organisation in some way.

Sense of identity and history – there is fear that this will disappear. So, the question becomes whether identity is related to board or branding particularly in regard to some of the grass roots services.

Loss of local connections is something that needs to be mitigated against.

From the experience of the Save the Children Merger, it is clear that the most important factor is the ability to keep your focus on what your end game is.

The journey to mergers and collaborations is just that. Boards and CEOs should not be frightened to pause or even opt out if the proposed arrangement is not going to better achieve their purpose.

Don't forget about private for profits as potential partners, as they sometimes even have stronger NFP-type values than NFP orgs.

Change management is required – CEOs often need to initiate change, then support change at a Board level, then bring the staff, and other stakeholders along.

There are a lot of changes happening across all sectors at the moment – so it is an interesting time to stop and ponder what it is going to look like in 10 years' time – maybe for-profits will have a stronger role to play.

Commercial providers have already started to move into the space and will probably do so more especially with NDIS – need to consider how will this impact the sector?

You need a strategic process of consideration and to be clear in the outcomes before you agree on the structure to achieve this.

Importance of culture – don't underestimate how long the process will take and how important it is to bring everyone along. Research shows that it is different cultures that causes failures in mergers. It is important to be aware of the prevailing culture and take it into consideration before you move to restructure. It is also important how people are treated through the process.

Entrepreneurship / innovation should be tapped into more effectively than it currently is.

The Board needs to have a good argument as to why, before starting any process.

Structural impediments to a successful merge include long-term Board members who are generally less likely to be involved in mergers.

Someone needs to have authority to make the initial decision to explore a merger. Then the Board needs to have the leadership, authority, and skill-mix to carry it through. And in this respect, the constitution articles need to establish a mechanism for diversifying / changing the board.

There are three key reasons that organisations may consider a merge – generally they are looking to improve bottom line, value add, and transform their organisation in some way. This is good but they usually go wrong around the implementation. Doing numbers is easy. Coming up with vision is relatively easy. But implementation is difficult and bringing the rest of the org along with the vision is also difficult – which could be because of ego, and / or reluctance to change.

One issue is that people feel that decision making gets removed in cases where a larger org “takes over” a smaller local organisation – we need to be careful about this. While we might use the word merger, it could be something else.

History is not necessarily a barrier to change. There were a lot of organisations around 100 years ago that don't operate any more.

We not-for-profits don't have market analysis whereas commercial organisations have constant market analysis. There are lots of companies that have major research arms that have good market analysis and measures. There is a clear metric. But in the not-for-profit sector you don't have these intermediaries that you have in the for-profit sector.

History is not necessarily a barrier to change. There were a lot of organisations around 100 years ago that don't operate any more.

Pace of current environment is a bit scary – 5-10 years ago things were more stable but now you are setting up in a totally different and rapidly changing environment.

You must have respect for the past.

In the sector we don't have any of the “mentors” that exist in the for-profit sector who can facilitate.

Sometimes mergers don't happen because people don't have time or energy, or resources.

People merge with people – organisations don't merge with organisations. Accordingly strong leadership is essential.

Not-for-profits are distinguished by their passions and it is sometimes hard to make passions align. There is not much passion in pay systems so it might be easier to just do this without treading on the toes of those with passion who can still continue with their passion work.

It is important in mergers to understand culture differences, planning, financial impacts.

Need to move towards aligned mission statements, board agreements etc.

There needs to be a respect for all parties and a focus on the benefits of the outcome.

Specific comments on collaboration

Collaboration can take many forms and can be instead of, or part of, the journey along the path to merger.

Embedding is one avenue to consider. An example is a specialist refugee worker is placed in another established organisation to work with a certain cohort and is able to integrate the work they are doing across both organisations. The mother organisation doesn't have to have separate centres all over the place.

We need a bigger discussion on the sector more generally ... we operate in silos!

It is useful to think of the concept of partnership as part of a continuum.

Broker model is where a major organisation gets funding to provide / manage a smaller organisation or project in order to provide a service for government. There are some successful models of brokerage around.

There is currently a strong appetite in government for shared services.

Mergers could be a continuum ie a series of collaborations rather than just the final merge of organisations becoming one.

Collaboration can be just around one piece of work. Even on this basis, it is important to establish MoUs upfront including built in review periods.

Cooperatives are another option – an example is one state where 70 community providers of transport were facing funding cuts and needed to consider closing down, so they formed a cooperative instead.

Mutuals and Hubs – we are about 3 years behind the US in regard to both of these.

Collective purpose – sometimes co-location leads to collaboration including sharing back office services and administration.

NSW Government preschools were facing funding cuts so retained their separate boards but coordinated back-end activities allowing the centres to purchase financial services etc.

Shared structures – this should be talked about more.

Mergers could be a continuum ie a series of collaborations rather than just the final merge of organisations becoming one.

One failed famous merger actually had a good outcome – as after the fallout, they came back together again to do wonderful collaborative work.

Some questions attendees asked panelists

What framework did you use to look at the differences between the values and cultures of both organisations – and how did that work?

On the pathway to merging – do you come together from the start talking about it. Or do you do a collaboration and then talk about the possibility of merging?

How do you take philanthropy across (as opposed to government grants)?

Other countries have rules on new charities starting up so why doesn't Australia?

How important is the brand compared to the outcomes?

How do you message it to community? Ie when you see a large organisation take over a small organisation this often gives a negative impression. How to bring the local connections with you?

Are there models in the sector that are actually showing that shared services is working? If, so, then how do we start?

Other countries have rules on new charities starting up so why doesn't Australia?

Did you have clear goals set around improving outcomes?

At what stage along the journey did you have the conversation with your staff?

Did you retain the identity of the service?

Should the federal government be dissuading new charities from starting up so easily?

How do you really build trust between 2 organisations – ie people can say the right things but how do you know that you really have that trust?

Please note: some of these questions are addressed as part of the case study #GoodSave Appendix 3

Next steps for Community Council for Australia

As a leadership network formed to provide leadership by the sector, for the sector, the Owing Our Future Series 2 discussions confirm that CCA is on the right track in pursuing the issue of mergers and collaborations with the sector.

Government also has a role to play and in this regard CCA has submitted as one of its recommendations in the 2016-17 Federal Government Budget submission that the Government, in consultation with the NFP sector, develop a future blueprint for the sector. Such a blueprint should include extensive consultation to develop economic modeling of future scenarios along with strategies to capitalise on emerging opportunities and ways to respond to emerging risks and limitations. Issues to be considered would include: performance and productivity measures; better using existing assets; promoting social enterprise; capacity building; the NFP workforce; and of course, the potential for mergers and collaboration focusing on the effectiveness to be achieved through scaling of effort, collective impact, and back office mergers.

The Community Council for Australia will continue to advocate around this agenda.

APPENDIX 1: List of attendees

Melbourne

Name	Position	Organisation
Georgie Harman	CEO	Beyond Blue
Julie Reilly	CEO	Australian Women Donors Network
Craig Connelly	CEO	Ian Potter Foundation
Sylvia Admans	CEO	R E Ross Trust
Ross Mackay	CFO	Jobs Australia
Brett Williamson	CEO	Volunteering Australia
Francesca Manglaviti	CEO	Crohns & Colitis
Peter Sparrow	CEO	Carer Support
Sarah Hosking	CEO	Very Special Kids
Jennifer Fitzgerald	AR	Scope
Charles Cox	Manager, Planning & Business Development	Eastern Volunteers
Ron Mell	CEO	YMCA
Melinda Crole	Executive Manager, Licensing & Development	YMCA
Julie McDonald	Executive Manager, Communications	YMCA
Katrina Birch	CEO	Financial Basics Foundation
Melissa Grenville	Board Member	School of Hard Knocks
Don Christie	Director	Charitable Connections
Robyn Rose	Chair	Volunteering Victoria

Brisbane

Name	Position	Organisation
Sue Donnelly	Executive Director	Queensland Theatre Company
Ivan Frkovic	National Operations Mgr	Aftercare Qld
Brett Williamson	CEO	Volunteering Australia
Nigel Harris	CEO	Mater Foundation
David Curd	Executive GM Growth Strategy/ Community Solutions Division	Endeavour Foundation
Julie McLellan	CEO	Healthy Waterways
Faye Lee	CFO	Healthy Waterways
Sarah Jones	Manager, Partner Services	Healthy Waterways
Douglas Elsmore	President	Queensland Homicide Victims' Support Group
Debbie Lawler	Secretary	Queensland Homicide Victims' Support Group
Ross Thompsom	General Manager	Queensland Homicide Victims' Support Group
Dr Ian Law	CEO	Relationships Australia (Qld)
Debra Cottrell	CEO	Carers Qld
Jim Toohey	Board President	Carers Qld
Annmaree Callander	CEO	Brisbane Youth Service

Continued - Brisbane

Name	Position	Organisation
Bronwyn Mitchell	CEO	Lifebridge
Norm Henstridge	Director	Lifebridge
Graham Davis	Board Director	TransitCare
Terry O'Toole	CEO	TransitCare
Claire Treadgold	Board Director	Lifebridge
Chris Williams	Partner	PwC
Russell Mason	CEO	Suncare Community Services
John Loxton	Board Director	Suncare Community Services
Dennis Young	CEO	Drug ARM

Perth

Name	Position	Organisation
John Thomson	Chair	YACWA
Kylie Hansen	Strategic Policy Specialist	YACWA
Martin Black	Board Chair	Ngala
David Johnson	CEO	Asthma Foundation WA
Spencer Broad	Board Director	Asthma Foundation WA
Maxinne Sclanders	Board Director	Midlas
Simon Kimber	Chair	Midlas
Karyn Lisignoli	CEO	Nyoongar Wellbeing & Sports
Kathryn Gregory	CEO	Foundation Housing
Allison Leonard	Executive General Manager Corporate Support	Anglicare WA
Marzel Norton	Chair	Allambee Counselling Inc
Mara Basanovic	CEO	Volunteering WA
Colin Ingram	Snr Planning Officer	Dept of Parks & Wildlife
Helen Douglas	Treasurer	Peel Youth Centre
Christine Foote	General Manager	Harold Hawthorn Community Centre
Sandra Brown	Deputy Chair	Harold Hawthorn Community Centre

Sydney

Name	Position	Organisation
Peter Allwood	COO	Canteen
Judy Barracclough	Head of Strategy	The Smith Family
Kelly Beaumont	Director	NonProfit Alliance
Wendy Bruce	CEO	Fragile X Association
Gil Cremer	CEO	Diabetes ACT
David Crosbie	CEO	CCA
Tim Curran	CEO	CareWest
Kamalle Dabboussy	Chair	Settlement Services International
Brian Doolan	CEO	The Fred Hollows Foundation
Linda Graham-McCann	CEO	Work Ventures
Lisa Grinham	CEO	Charities Aid Foundation
Jack Heath	CEO	Sane

Continued - Sydney

Name	Position	Organisation
Ben Jackson	Executive Officer	Hills Community Aid
Judith Lenart	Director	Fragile X Association
Debbie Littlehales	Prof Development Mgr	Community Colleges Australia
Carmel Molloy	Director	NonProfit Alliance
Victoria Morris	Assoc Director Strategy & Governance	The Fred Hollows Foundation
Paul Murnane	Chairman	Australian Scholarships Foundation
Dr Lisa O'Brien	CEO	The Smith Family
Violet Roumeliotis	CEO	Settlement services International
Barbara Ryan	National Manager Program Reach	Ronald McDonald House Charities
Bethwyn Serow	Executive Director	Australian Major Performing Arts Group
Nicola Stokes	CEO	Special Olympics Australia
Tirrania Suhood	Managing Partner	InCollaboration
Timothy Vial	National Finance Mgr	Canteen
Cheryl Walmsley	Chair	Lifeline Northern Beaches

Canberra

Name	Position	Organisation
Brett Williamson	CEO	Volunteering Australia
Amanda Power	A/c CEO	St Johns Ambulance Australia
Mary Reid	Business Mgr	Carers Australia
Angela Ingram	President	Mental Health Foundation
Sr Mary Quinlan	Regional Leaders	Sisters of St Joseph
Sharon Tuffin	CEO	Karralika
Christina Ryan	CEO	Advocacy for Inclusion
Maureen Cane	CEO	Volunteering & Contact ACT
Jenny Johnson	CEO	Rural Doctors Association of Australia
Beryl Gover	Secretary	Canberra-Queanbeyan ADD Support Group
Mike Morriss	President	Canberra-Queanbeyan ADD Support Group
Tony Henshaw	Board Director	TADACT
Libby Steeper	Board Director	Friends of Brain injured Children & SHOUT

Expert Panelists

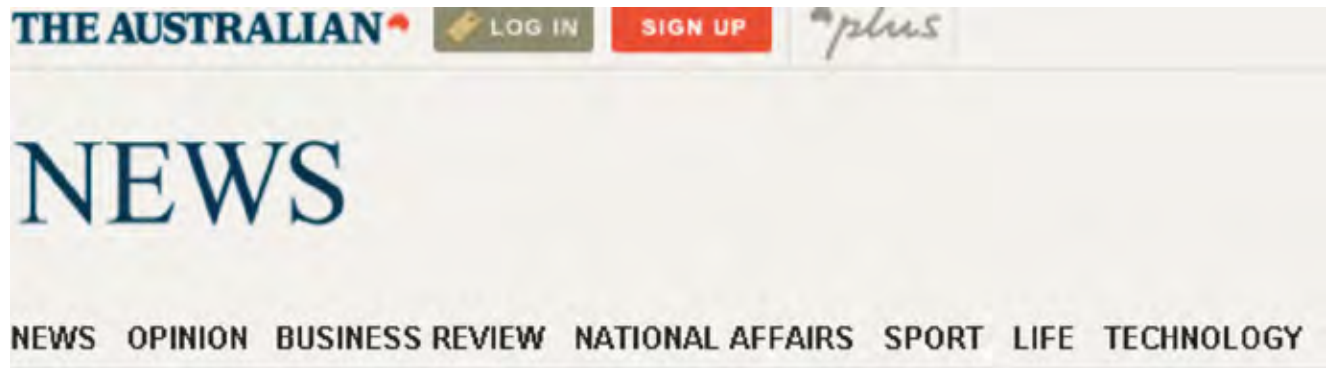
Name	Position	Organisation
David Crosbie	CEO	CCA
Jayne Meyer Tucker	Founder	JMTinc
Mark Reading	Partner	PwC
Julian Williams	Partner	PwC
Christopher Williams	Partner	PwC
Stephen Hanson	Director	PwC
Craig Heatley	Partner	PwC
Rose Stellino	Relationships Director	Westpac

Continued - Expert Panelists

Name	Position	Organisation
Leonard Vary	CEO	Myer Family Foundation
David Locke	Assistant Commissioner, Charity Services	ACNC
Murray Baird	Assistant Commissioner, General Counsel	ACNC
Susan Pascoe	Commissioner	ACNC
Shirley Southgate	Director	ACNC

APPENDIX 2: Media coverage

The Australian



Push to restructure the charity industry: 'merge or close'

THE AUSTRALIAN | NOVEMBER 11, 2015 11:04AM

12

SAVE



Simon King
Senior Reporter
Sydney

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Tim Costello, chair off the Community Council for Australia, said the sector should stop competing against itself for donations and take advantage of its existing infrastructure. Picture: Adam Yip.



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NOVEMBER 11 2015

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Charities body calls for mergers

Alexandra Back

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Australian charities could struggle to survive if they continue to compete with one another for increasingly limited funding, the Community Council for Australia has warned.

Council chief executive David Crosbie said charities needed to consider merging or collaborating to make the sector stronger, especially in the case of "federated" charities, which existed at state and national levels.

"[The industry] has been able to grow on the back of increased giving, increasing government funding and increased capacity to raise money from fees and charges and ticket prices."

But, he said, all that was stalling

It was becoming harder to justify "federated" charities, Mr Crosbie said.

"Sometimes the competition between organisations sharing the same name is as fierce as competition outside of those organisations.

"It just makes very little sense unless you can justify it in some way."

He said there were hundreds, if not thousands, of Australian charities set up this way.

One of those is the Cancer Council, which has a chief executive and board in each Australian state and territory, as well as at a national level.



Community Council for Australia chief executive David Crosbie has warned charities need to consider merging to survive. Photo: Glen McCurtayon

Cancer Council Australia CEO Professor Sanchia Aranda agreed that greater collaboration in the charity sector leads to improved efficiencies and economies of scale, especially among organisations with a shared focus.

But, she said, the Cancer Council's federated model continued to serve communities well.

"Cancer Councils are able to leverage state, territory and local relationships and arrangements, while having a shared national focus as the only not-for-profit in Australia involved in every facet of cancer control for every cancer type," Professor Aranda said.

But she said the charity also shared resources.

"Our national services and resources, such as our 13 11 20 information and support hotline and a suite of national publications, are supporting our mission Australia-wide. We also share pro-bono legal and financial services and have a national competitive research grants program.

"Cancer Council operates as a cohesive federation and is continually exploring new efficiencies."

Mr Crosbie said the merging of charities did not necessarily mean services were compromised, because they would spend less duplicating infrastructure.

"Just because you don't have your own CEO doesn't mean you can't be close to the community and provide very good services. There's not many other sectors that insist on having separate governance structures," he said.


But he admitted the warning and accompanying advice for charities to merge or collaborate would be controversial.

"Sometimes it's important to step back and say, well what are you here for, what are you trying to do? What would be best for this community? It's not always just running your programs and services.

"Those are hard discussions to have with charities who have been able to grow year on year on year.

"It's a bit of a crunch point."

Peak body calls for charities to merge amid funding squeeze

 Judith Ireland [Twitter](#)

The peak body for Australia's not-for-profit sector is calling on charities to think about closing or merging, because there are too many organisations competing for funds.



Community Council for Australia chief executive David Crosbie. Photo: Colleen Patch

Community Council for Australia chief executive David Crosbie warned that with government revenue shrinking and fewer Australians giving to charity, there was a "squeeze" on the charity sector and it needed to think creatively.

A recent Roy Morgan poll found 65 per cent of Australians surveyed gave to charity in 2014 compared to 71 per cent in 2010.

Mr Crosbie said Australia's estimated 600,000 not-for-profits and almost 60,000 registered charities were duplicating work as well as having to compete harder for fundraising and government contracts.

"That trend is actually quite dangerous for the sector," Mr Crosbie said.

He called on the not-for-profit sector, which turns over about \$105 billion each year, to consider mergers or collaborating to strengthen services and stop doubling up on work.

Mr Crosbie said this could involve sharing things such as IT and communications teams or for federated charities - that had national and state-based arms - to consolidate their infrastructure.

Conceding that some in the sector would find the idea confronting, he said the focus needed to be on "achieving benefits to communities" rather than the self-interest of the organisation.

World Vision chief executive and Community Council chair Tim Costello said donors found the increasingly fragmented charity sector "very confusing".

He added that many charities started with a lot of passion but faltered two or three years later due to administrative burdens. Mr Costello said people should consider "channelling that passion through [an organisation] that already exists".

In July, Good Beginnings, an organisation that helps vulnerable children with programs like parenting courses and family group meetings, merged with Save the Children.

Former chief executive Jayne Tucker led the change, even though Good Beginnings was turning over millions of dollars a year and the merger has seen her out of a job.

Ms Meyer Tucker said it was important for charities to look at how they could grow their "outcomes", not their organisations.

"I feel that if we are simply in this game to enhance our personal careers or make a bigger organisation or get a bigger salary, then I'm questioning how much we are exploiting the people we are serving," she said.

She said that Good Beginnings on its own was only able to help about 8000 children a year while joining with Save the Children could increase its reach.

"We knew how many vulnerable children there are in Australia," she said.

"On our own, we were not going to be able to help influence the larger group."

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Crosbie calls for sector reform through charity mergers



EMMA McDONALD
© NOVEMBER 10, 2015

Sector heavyweight David Crosbie urges Australian charities to merge, instead of competing for the same funding, in order to survive.

Hundreds of Australian charities must be dissolved or merged to stop not-for-profits cannibalising each other in the \$105 billion a year industry, the sector's peak body says.

Community Council for Australia (CCA) chief executive David Crosbie says charities are too often clambering for cash to tackle the same problems, creating unnecessary duplication.

Mr Crosbie said on Tuesday there were well in excess of 60,000 registered charities and 600,000 not-for-profits in Australia.

He said the number of new charities surged 10 per cent between 2011 and 2014 and continued to grow but government funding options had diminished and private donations were drying up.

"The more we compete within the sector, the more it highlights division and erodes public trust," Mr Crosbie said.

"People want to see charities and not-for-profits working for their communities, not just trying to make the most money they can for their own organisations."

Mr Crosbie was especially critical of federated charities, saying charitable cash was being wasted on duplicated management roles, infrastructure and back office systems.

He said smaller organisations should also consider drawing on the resources of other larger ones to provide back office and other support.

"This is money and effort that would be much better invested providing services at the coalface," Mr Crosbie said.

The CCA will host a series of forums later this month to investigate folding scores of charities across the country.

CCA chairman Tim Costello, who chairs World Vision, said NGOs needed to put self-interest aside to help reform the sector, which has an annual turnover of about \$105 billion.

"Rather than playing the victim we need to take charge of our own futures and better collaborate and share," Reverend Costello said.

"We're not the charity police and this isn't about big taking over small. But because we're so fragmented our strength, voice and impact is being diluted."

AAP.



NEWS

Community Council: Charities should close or merge

11th Nov 2015 2:00 PM



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THE Community Council for Australia has warned hundreds of charities should consider closing or merging because too many charities and not-for-profits are competing with each other in a tougher and tougher operating environment.

CEO David Crosbie said numerous charities need to merge to make the sector stronger adding that 'duplication and increased competition' is affecting the massive sector - which turns over \$105 billion annually and employs 9% of the Australian workforce.

He said it is time for organisations to put self-interest aside and work together to get better outcomes.

"While many charities only survive by living off the smell of an oily rag and relying on volunteers, this frugal approach is not always the best way to save money and serve the community. Collaboration and possible mergers should be a part of future planning for all charities," Mr Crosbie said.

"Far too many Australian charities are competing with each other and it is time for major change in a sector that has 600,000 not-for-profits and 60,000 registered charities collectively turning over more than \$100 billion.

Mr Crosbie said hundreds of charities should disappear altogether and says undoubtedly there should be more mergers in the sector because the duplication and competition has meant 'there's been a significant amount of wasted effort'.

Mr Crosbie cited the example of the recent merger between Good Beginnings Australia and Save the Children Australia.

"Here you have two CEOs and two Boards willing to put aside their own personal and professional interests to ensure they better serve the needs of disadvantaged children in Australia. This kind of merger should not only be commended, but should also be replicated across a significant number of organisations.

"It shows that when good organisations with good leadership focus on better serving the community, the options of pooling resources and knowledge and local networks may well be attractive and lead to mergers."

Community Council for Australia highlights over 80% of the 60,000 registered charities in Australia turn over less than \$1 million whilst overall they collectively turn over more than \$105 billion.

The number of charities in Australia is growing at around 3% a year. This increased by 10% between 2011 and 2014. The not-for-profit sector now employs a huge 9% of the Australian workforce totalling 1.1 million Australians.

The Community Council for Australia (CCA) is about to launch a special series of forums that seek to reduce the number of charities in Australia.

CEO of World Vision and chair of CCA Rev Tim Costello was in supported of the forums.

"These new CCA Forums are about honouring the trust the community gives to charities. All of us need to ensure we are doing everything possible to provide the best possible services in the best possible way. Most people do not care whether it is one kind of organisational structure or another that does the work. They do care whether their money is being used as effectively as possible to address their issue of concern," he said.

The Collaboration and Mergers Forums will be held in Brisbane, Melbourne, Sydney and Perth over the coming month and are supported by the Myer Foundation, PWC and the Australian Charities and Not-for-profit Commission.

For more information visit: <http://www.communitycouncil.com.au/content/ceo-and-board-leaders-forum-collaboration-and-mergers>

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NEWS

It's merge or die for Australian charities



Chris Calcino | 11th Nov 2015 5:00 AM

f 1 | | PRINT | 4 COMMENTS

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World Vision chief executive officer Reverend Tim Costello says the pressure is greater than ever for charities to spend donations wisely.

REGIONAL charities struggling to stay afloat have been told to pool resources into a "regional back office" to share the load of day-to-day pressures.

Community Council of Australia CEO David Crosbie said hundreds of charities across Australia should close or merge to avoid competing with other not-for-profits and duplicating services.

The sector's turnover has more than doubled since 2007 from \$46 billion to \$105 billion.

Mr Crosbie said saturation point had been reached and regional Queensland charities should, at the very least, share and standardise their resources.

"It's very hard to keep the doors open when you have to run your own office, IT system, payroll, cars and transport and employ staff," he said.

"Just running the organisation takes a lot of work.

"There should be more scope for regional back office support - hubs where all charities can buy in to use one IT system and a single payroll system.

"It would take pressure away from running the organisations and allow them to focus on what they do well."

Mr Crosbie said smaller charities should take on a similar business model to a large corporation with branches and small offices.

"Even for fundraising at a local level, why wouldn't five charities get together instead of having five different people knocking on doors and sending out mail?" he asked.

"They need to find new ways to collaborate.

"There's a significant amount of wasted effort."

The number of charities in Australia grew by 10% between 2011 and 2014, and they now employ 1.1 million people - 9% of the country's workforce.

World Vision CEO Reverend Tim Costello said all charities needed to ensure they were spending their donations wisely.

"Most people do not care whether it is one kind of organisational structure or another that does the work," he said.

"They do care whether their money is being used as effectively as possible to address their issue of concern."

Mr Crosbie said making the change would require tough decisions.

"Merger is still a dirty word in our sector. The idea of stepping aside for others to operate is still considered incredibly difficult," he said.

"Some charities say they run on an oily rag, use volunteers and are incredibly spendthrift, so how could there be waste?"

"But sometimes the effort to not spend money can detract from providing good quality services."

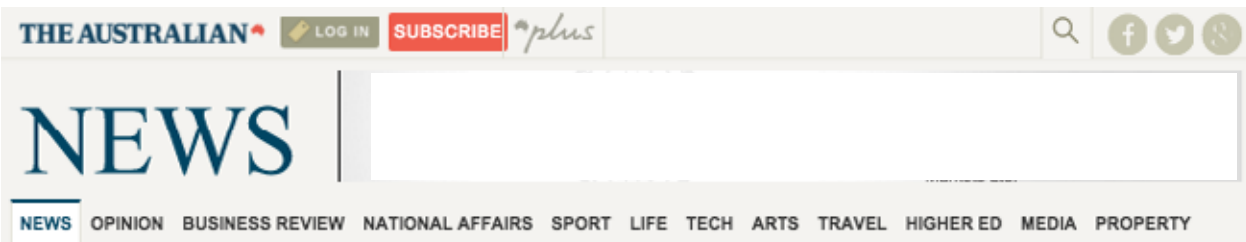
Large federated organisations were told they had to justify having "eight different CEOs, eight different finance and human resources teams and eight competing fundraising teams".

Mr Crosbie pointed to the recent merger of Good Beginnings Australia and Save the Children Australia as an example of a smart decision devoid of ego.

"Here you have two CEOs and two boards willing to put aside their own personal and professional interests to ensure they better serve the needs of disadvantaged children in Australia," he said.

"This kind of merger should not only be commended, but should also be replicated across a significant number of organisations."

-APN NEWSDESK



NATIONAL BREAKING NEWS

Charities trip over each other for funds

BY DANIEL MCCULLOCH
AAP | 7:26AM November 11, 2015



HUNDREDS of Australian charities must be dissolved or merged to stop not-for-profits cannibalising each other in the \$105 billion a year industry, the sector's peak body says.

COMMUNITY Council for Australia (CCA) chief executive David Crosbie says charities are too often clambering for cash to tackle the same problems, creating unnecessary duplication.

Mr Crosbie said on Tuesday there were well in excess of 60,000 registered charities and 600,000 not-for-profits in Australia.

He said the number of new charities surged 10 per cent between 2011 and 2014 and continued to grow but government funding options had diminished and private donations were drying up.

"The more we compete within the sector, the more it highlights division and erodes public trust," Mr Crosbie said.

"People want to see charities and not-for-profits working for their communities, not just trying to make the most money they can for their own organisations."

Mr Crosbie was especially critical of federated charities, saying charitable cash was being wasted on duplicated management roles, infrastructure and back office systems.

He said smaller organisations should also consider drawing on the resources of other larger ones to provide back office and other support.

"This is money and effort that would be much better invested providing services at the coalface," Mr Crosbie said.

The CCA will host a series of forums later this month to investigate folding scores of charities across the country.

CCA chairman Tim Costello, who chairs World Vision, said NGO's needed to put self-interest aside to help reform the sector, which has an annual turnover of about \$105 billion.

"Rather than playing the victim we need to take charge of our own futures and better collaborate and share," Reverend Costello said.

"We're not the charity police and this isn't about big taking over small. But because we're so fragmented our strength, voice and impact is being diluted."

KEY DETAILS ON CHARITY

- * There are 600,000 not-for-profits in Australia and 60,000 registered charities.
- * More than 80 per cent of registered charities turn over less than \$1m a year.
- * The number of registered charities surged by 10% between 2011 and 2014 and is growing at about 3% a year.
- * Australia's charity sector turns over \$105b annually and employs 9% of the country's workforce.



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OPINION

OPINION: Are too many charities doing the same thing?



Peter Chapman and My Comment | 11th Nov 2015 10:00 AM



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3 COMMENTS



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IF I asked you to take a guess at how many people in Australia work for a charity organisation what would you say?

I'll give you the answer and it's amazing.

In all, 1.1 million are paid to work for a charity and that equates to a staggering 9% of our entire workforce.

In all there are 600,000 not-for-profits and 60,000 registered charities who between them turn over \$105 billion each year.

While it is great to hear we have so many groups working to help those most in need, the truth is that many are duplicating the work of others.

The CEO of the Community Council of Australia, David Crosbie, has now warned this massive sector that hundreds of charities should now consider closing or merging because too many are competing with each other in an operating environment that is growing tougher by the day.

He says organisations now need to put self-interest aside and work together to get a better result for those who need their help. He claims the duplication and competition has meant 'there's been a significant amount of wasted effort'.

If you have been worried about how much of your donated dollar is actually getting to the person in need, you may want to applaud his comments.

For years, major charities have been accused of wasting far too much of their money on exorbitant administration costs.

Don't get me wrong, charities around the nation do an extraordinary job, however times have changed dramatically.

A great example of what needs to happen is the recent merger between Good Beginnings Australia and Save the Children Australia.

Here you had two CEOs and two boards willing to put aside their own personal and professional interests to ensure they better serve the needs of disadvantaged children in Australia.

According to Mr Crosbie this kind of merger should not only be commended, but should also be replicated across a significant number of organisations.

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Organisations can ward off 'charity fatigue' by collaborating, World Vision CEO Tim Costello says

Posted 11 Nov 2015, 12:26pm

The peak body representing non-profit organisations in Australia says there are too many charities and some need to close or merge with others.

World Vision boss Tim Costello, who is the chair of the Community Council for Australia, said a number of round tables were being held to discuss the issue.

Mr Costello told News Breakfast charities should be collaborating more to prevent duplication and ward off charity fatigue.

"We are all picking up that people are sick of being mugged in the streets, charity muggers, cold calls, so much competition on the charity dollar from charities doing the same thing," he said.

"We're saying if you can share back offices, let's get together, share resources ... if your purpose can be fulfilled through merging, with greater impact, we should talk about it."

Mr Costello said he understood that many organisations would fear merging could erode the credibility that their respective brand names had built up.

"We want new entrants that are going to do things that are innovative, but when you think there are 65,000 charities in Australia, they don't all have a brand name," he said.

"Many of them are doing child leukaemia work and lots of people start a charity with great passion and find three or four years in, they're running an organisation changing dollars that kills their passion."

Federated groups of charities 'obvious starting point'

Mr Costello identified Red Cross as an organisation that had collapsed its state bodies and subsequently emerged as a more cost-efficient single body.

While he did not have a "hit list", he said Lifeline had multiple offices and boards that were competing against each other for contracts and tenders.

"The only thing we'd say on the hit list is federated groups that are the actual same charity in Australia, that's a really obvious starting point," he said.

Mr Costello said he thought Malcolm Turnbull's ascension to the Prime Ministership might help reverse the trend that has seen donations down since the global financial crisis.

"We're the third-richest nation on earth still, if we can't give overseas aid now, when could we?" he said.

"If we can't donate to homeless now, when could we? I think the political climate may start to bring confidence."

Mr Costello pointed out that in Britain charities had to prove they were not duplicating the work of existing charities and he said that it was important that organisations were "collaborators" rather than competing for funds.




PHOTO: World Vision CEO Tim Costello says Australia has too many charities. (AAP: Alan Porritt)

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MAP: Australia

APPENDIX 3: The #GoodSave Case study

By Jayne Meyer Tucker

“Reform is not needed, neither is evolution. What is needed is a revolution to a system that is fit for purpose in the 21st century!”

A strong statement and one that is set on purpose to also set the scene and debate for the Community Council for Australia 2015 CEO and Board leader Forums.

As the former CEO of Good Beginnings Australia I enjoyed a tenure across eight years and led Good Beginnings Australia to much success:

- Implementation of an organisation wide Outcomes Based Accountability Framework
- Establishing the Future Five strategic plan 2011-2016 to align quality, growth and outcomes
- Winning the PwC Transparency Awards as Best First Time Entrant 2013
- Championing the need to mobilise systemic change across the children and young people Not For Profit sector
- Awarded three years National Quality Improvement Council (QIC) Accreditation, with standards of excellence achieved in the areas of community capacity building cultural safety and partnerships (2015)

... there are over 600,000 plus charities in Australia with 9 opening every week.

I can fully understand that the list above presents Good Beginnings Australia as a successful organisation and therefore it does raise the question - why merge?

The Community Council for Australia has clearly outlined the status of the not-for-profit sector. Employing over one million Australians with a turnover of more than \$107 billion each year contributing 4% GDP and being second only to the mining industry. The most disturbing statistics taken from the Australian Charities and Not-for-profits Commission is that there are over 600,000 plus charities in Australia with 9 opening every week. It is a crowded market and in my opinion, the moral obligations to best meet social purposes are being lost in this competitiveness.

Good Beginnings Australia may not have been a large organisation in dollar value (\$8m) but it was strong in its outcome achievement and a leader particularly in engaging vulnerable communities leading to better outcomes for children. Being extremely committed to the purpose and moral obligation the need to be at the forefront of meeting its social purpose were the underpinning reasons to merge. A willingness to embrace governance arrangements that are most suitable for the requirements of societal needs was the only motivation that was needed.

This paper and supporting presentation particularly for the Community Council for Australia CEO and Board leadership forums explains how Good Beginnings Australia became merger ready and the Social Connect platform that turned this aspiration into reality. The 1st July 2015 was the official merger date where Good Beginnings Australia became part of Save the Children Australia. Although Good Beginnings Australia was the smaller organisation it doesn't mean it wasn't strong. Once the two organisations began

discussions it was clear that 1+1 could equal 3. The drive to achieve more for vulnerable children was a mandate that both organisations were committed to. This presents as an Australian case study and is referred to as #GoodSave.

The saying 'getting your ducks in a row' is commonplace around governance arrangements. A more official term is due diligence. The practice of due diligence is most typical of the Corporate sector and through various organisations (particularly legal and consultant firms) documentation and self-help merger tools have been prepared to assist the not-for-profit sector with this process.

The shared purpose upheld expectations that the individuals involved would be able to shift from ego to purpose and more importantly be part of an even bigger ecosystem.

There is one outstanding problem as one size does not fit all and the not-for-profit sector is not easily lined up and nor should it be. This does not mean that good governance cannot be achieved – quite the opposite as demonstrated by #GoodSave. As there is no one size fits all clarity of purpose is the prime focus and the governance arrangements must **STRADDLE™** both structure and spontaneity. [see www.socialconnect.com.au for further information on the GoodSave approach and development of **STRADDLE™**]

In the merger of Good Beginnings Australia and Save The Children Australia, the governance arrangement was technically a mixture of an acquisition and merger arrangement. The shared purpose upheld expectations that the individuals involved would be able to shift from ego to purpose and more importantly be part of an even bigger ecosystem. Although an understanding of an organisation's ecosystem takes time, it is imperative that this understanding underpins the preparation and decisions that consequently influence the choice of governance arrangements.

To operationalise the ecosystem I have been focusing my academic work on the development of a Social Connect platform, which is divided into two phases. The first phase ensures the organisation is ready to collaborate with clarity for long-term systemic change. The second phase introduces three breakthroughs that enable the desired long-term decisions to be made and changes to become a reality.

The goal of the Social Connect platform is to assist not-for-profit organisations be more focused on their purpose and be willing to embrace governance arrangements that are most suitable for the requirements of societal needs.

As part of Community Council for Australia CEO and Board leader Forums I will be sharing the lessons of #GoodSave – what went well, what didn't, what we would have done differently and what was to be celebrated.

Some examples:

What went well:

The most important development from #GoodSave was the opportunity for enhanced outcomes. The ability to expand 150 locations across Australia and be measured through a bold goal that children be school ready enabled Good Beginnings Australia to immediately expand its vision – a good beginning for Australian children.

“Focus on growing the outcomes not growing the organisation”

What didn't go well:

The biggest challenge was getting the culture of the two organisations to align and although much attention was applied to this it is an area that could always be improved, needing much ongoing attention. A great example was how the two organisations treated flexible working arrangements - one with more structure and one with more spontaneity. Another example was how much and when communication about the possible change could and should have been shared at varying levels of both organisations.

What would be done differently:

A key area of change would be to engage an independent source (preferably not legal) to oversee the whole process at Board and CEO level. For example the 12 principles that were agreed between the two Boards were not all upheld and last minute changes timing made this difficult to positively effect. Expect the famous '11th hour'!

What was to be celebrated:

It is do-able and possible! #GoodSave presents as a useful demonstration case study. Lessons can be learned and application can be made for future considerations and other organisations.

The Social Connect Phase 1 dialogue began in May of 2013 when a key strategic discussion was held with the Good Beginnings Australia Board and Executive around the organisation's moral obligation and the broken funding system of the Not For Profit sector.

By December of 2013 the organisation (led by staff) developed and agreed a manifesto that clearly described the commitment to Good Beginnings Australia's vision and purpose. This was fundamental to setting the dialogue to achieve agreement to establish an Emergent Strategy, which resulted in a Board strategy discussion mid-2014. At this point the phrase 'disrupt the system till it works for children' had become a working title whilst the emerging options, both known and unknown, were explored.

It was around the same time that consultations with Save the Children Australia (one of the organisations identified in an environmental scan) became a possible option. At this point there were many emerging options including the development of the Emergent Strategy referred to as Mobilise 2026+. Between January 2015 and March 2015 decisions were made to seriously consider a merger with Save the Children Australia. By May 2015 the news was made externally and within a matter of 30 working days the merger had happened.

APPENDIX 4: Useful resources

Thinking big – To merge or not to merge – that is the question

A guide on mergers in the not-for-profit sector by Our Community

www.ourcommunity.com.au/files/ThinkingBig-MergersGuide.pdf

Pro Bono Feature

In an Australian exclusive, World Vision CEO Tim Costello, CCA CEO David Crosbie, Save the Children CEO Paul Ronalds and former Good Beginnings CEO Jayne Meyer Tucker, have all written articles published on the need for charities to consider merging.

www.probonoaustralia.com.au/news/2015/11/merge-or-shut-down-australian-charities-told

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